

Report on Sub-Saharan African Perceptions of Chinese Activities

ACE Team



About This Document

This document was prepared by the Africa-China Evaluation Team (ACE Team) for a decision maker with national security responsibilities. The research, analysis, and production took place over a 10 week period from September-November 2012 at Mercyhurst University, Institute of Intelligence Studies. The ACE Team was composed of five Intelligence Studies seniors: Lindsey Bostwick, Jacob Johnson, Joe Reinhard, Spencer Vuksic, and Grant Warnock.

The requirements were defined as:

What are the prevailing attitudes of relevant sub-groupings of Sub-Saharan Africans toward China's activities in Sub-Saharan Africa and how are these attitudes likely to change over the next five years? How are these relationships likely to strengthen or weaken over five years? What indicators within the, political, economic, and social spheres are likely to affect these attitudes?

- ❖ *Relevant subgroups will include but will not be limited to political, economic, and social.*
 1. *Social Aspects: Elites verse ordinary citizens, rural verse urban, labor verse professional perceptions*
 2. *Economic Aspects: Agriculture verse service verse manufacturing, large verse small businesses, business leaders perceptions*
 3. *Political Aspects: International verse domestic perceptions*
- ❖ *For the purposes of this project, the team will use the Department of State definition for "Sub-Saharan Africa" (Annex 1).*

Three other versions of this report are available: a PowerPoint which complements the key findings outlined in this document, a managed wiki at aceteam.muintel.org and limited hard copy books. The wiki and book provide individual country assessments for each major sub-grouping, detailed, narrative analysis of exemplar countries, and matrices of key relationship indicators utilized to rank current relationships.

All reports state the analyst's overall source reliability- high, medium, or low. High reliability is reserved for peer reviewed articles published by objective sources. Medium reliability is reserved for news articles that are corroborated and come from professional news outlets. Low reliability is reserved for open source information from unprofessional or unreliable news sources that nonetheless provided valuable insight into the target.

Analytic confidence ratings of high, medium, and low reflect the use of structured analytic methods and constraints on the analyst: time pressures, level of expertise, source reliability and corroboration, and task complexity.

Table of Contents

About This Document	1
Overall Key Findings.....	5
Economic Key Findings.....	6
Political Key Findings.....	9
Social Key Findings	12
Additional Findings	15
Country Reports.....	16
Angola.....	16
Benin.....	19
Botswana	21
Burkina Faso.....	23
Burundi	25
Cameroon	28
Cape Verde	30
Economic Narrative Report.....	30
Central African Republic	33
Chad.....	34
Comoros.....	36
Cote d'Ivoire	38
Democratic Republic of the Congo	40
Djibouti	42
Social Narrative Report	43
Equatorial Guinea	44
Eritrea	47
Ethiopia.....	49
Gabon	51
Gambia.....	53
Ghana.....	54
Guinea.....	57
Guinea-Bissau	59
Kenya	61

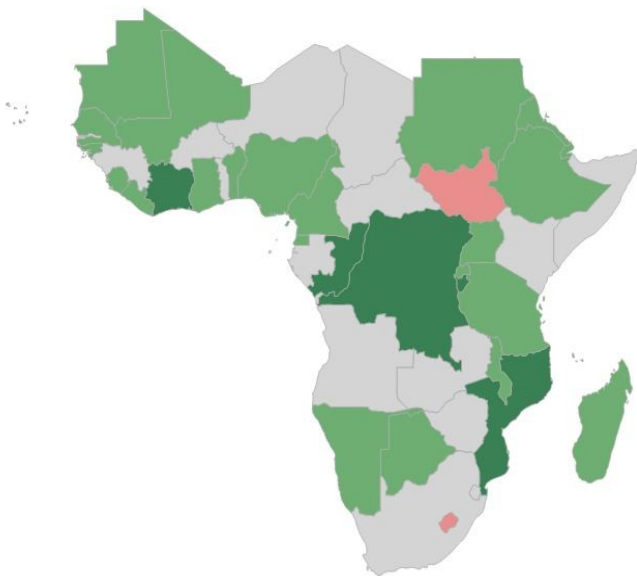
Political Narrative Report.....	62
Lesotho	64
Economic Narrative Report	64
Liberia	67
Madagascar.....	69
Malawi	71
Mali.....	73
Political Narrative Report.....	74
Mauritania	76
Mauritius	78
Mozambique.....	80
Namibia.....	82
Namibia.....	84
Nigeria	86
Republic of the Congo.....	88
Rwanda	90
Sao Tome and Principe	92
Political Narrative Report.....	92
Senegal	94
Social Narrative Report	95
Seychelles	97
Sierra Leone	98
Somalia	100
South Africa	102
Economic Narrative Report	102
South Sudan	105
Political Narrative Report.....	106
Sudan	109
Swaziland	111
Tanzania.....	113
Social Narrative Report	114
Togo.....	116

Economic Narrative Report	116
Uganda.....	118
Zambia	121
Zimbabwe	123
Annex 1: List of Sub-Saharan African Countries	125
Annex 2: Multi-Criteria Intelligence Matrix.....	126
Annex 3: Initial Data Matrix	127
Annex 4: Contact Information.....	128
Lindsey Bostwick.....	128
Jacob Johnson.....	128
Joe Reinhard	128
Spencer Vuksic	128
Grant Warnock.....	128
Sources	129

Overall Key Findings

Based on a comprehensive study of 49 Sub-Saharan African states, aggregate African perceptions of Chinese activities across economic, political, and social sub-groups are currently slightly positive and likely to remain positive over the next three to five years.

- ❖ Presently, it is likely that 33 out of 49 (67%) Sub-Saharan African states have positive perceptions, 14 (29%) have neutral or divided views, and two (4%) have negative views, as established in map one.
- ❖ Over the next three to five years it is likely that over the next three to five years 37 out of 49 (75%) states will have positive aggregate perceptions of Chinese activities, with 11 (22%) being neutral, and one (2%) having negative aggregate perceptions, as demonstrated in map two. This is likely primarily due to positive political and economic sub-group sentiments.
- ❖ Five Sub-Saharan African countries, specifically Benin, Central African Republic, Gabon, South Sudan, and Togo, are likely trending up in their aggregate perceptions of Chinese activities and 44 are remaining overall stagnant.



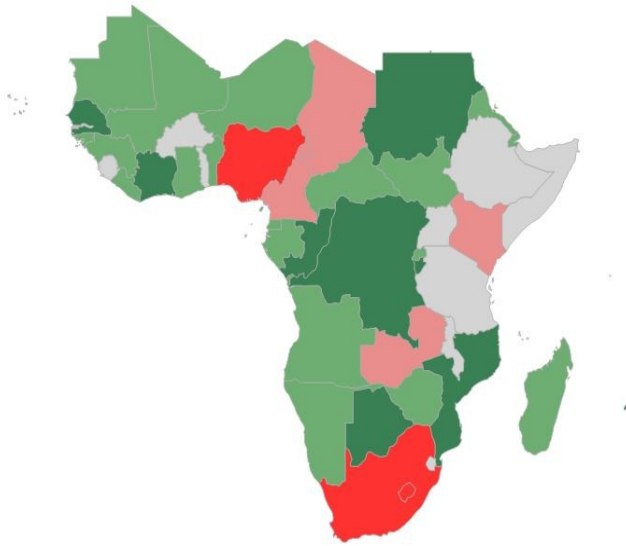
Map 1: Current estimate of aggregate perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).



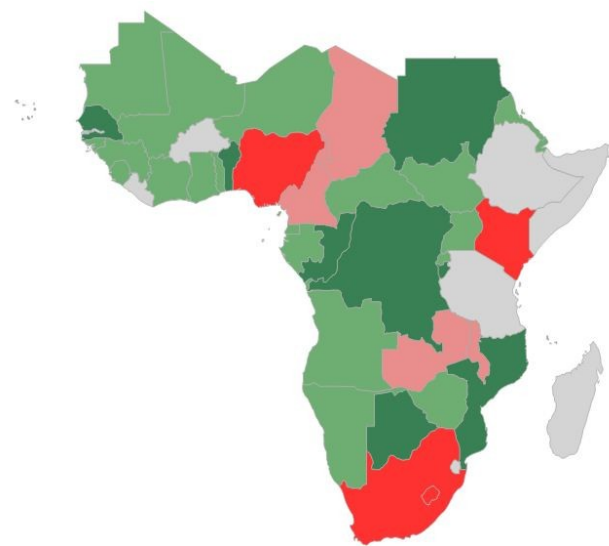
Map 2: Three to five year estimate of aggregate perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).

While the overall perceptions provide a useful average across all three relevant sub-groupings, the average filters out variations in the key sub-groupings. Specifically, while both economic and political sub-groupings show currently positive trends that are likely to remain positive, social perceptions show a negative trend over the next three to five years.

Economic Key Findings



Map 3: Current estimate of economic perceptions of Sub-Saharan African attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).



Map 4: Three to five year estimate of economic perceptions of Sub-Saharan African attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).

Business perceptions of Chinese activities in Sub-Saharan Africa are likely to remain largely positive (31 out of 49 or 63%) over the next three to five years, while only ten (20%) are likely to be neutral or divided and eight (16%) have negative perceptions. The trend over the next three to five years is large positive with seven positive trends and four negative trends with the majority having little or no trend. Perceived benefits from trade with China and Chinese development aid are strong indicators of positive perceptions. Specifically, exemplar countries include:

- ❖ Namibian businesses, according to J.E. Odada and Omu Kakujaha-Natundu with the Department of Economics at the University of Namibia, benefit from cheap inputs supplied by Chinese trade and Chinese infrastructure aid in rural regions of the country, which likely creates positive Namibian business sentiments toward Chinese activities.
- ❖ In Togo, market traders interviewed by researchers at London's South Bank University have expressed admiration for China's Africa-tailored export policy with one being quoted as, "For me, China has come to the rescue of Africa."
- ❖ According to the Centre for Studies and Research on Economic Analyses and Policies based in Brazzaville, Congo, inexpensive Chinese imports allow the Republic of Congo to expand foreign trade and reduce trade from neighbors, thus reducing prices between 7% and 45% and likely increasing positive Congolese business perceptions.

While trade benefits are a pan-African trend, Sub-Saharan African states with agrarian or service based economies are further indicative of positive business perceptions. This is likely due to the lack of competition between domestic producers and Chinese imports within non-industrial economies. Supporting exemplar countries includes:

- ❖ In 2011, the Cape Verdean Minister of Economy and Tourism noted the positive effects of increasing trade with China on the Cape Verde economy, which is 75% service based.
- ❖ At the Fifth Ministerial Meeting of Forum on China-Africa Cooperation in July 2012, Victoire Ndikumana, Burundi Trade Minister, speaking about the Chinese effects of the Burundi economy said, “The support of China is an innovative one, that no tied conditions it’s a friendly support and we do appreciate.”
- ❖ In a September 2012 meeting with the Chinese Ambassador to Comoros, Comorian Vice President in charge of Production, Environment, Energy, Industry, and Craft Ministries noted that "Comoros is grateful to the People's Republic of China for its invaluable and multifaceted development of the Comoros" especially for Comoros’ expanding tourism sector.

Chinese development programs which stipulate the use of Chinese contractors are highly likely to negatively impact business perceptions of Chinese activities. Supporting country examples include:

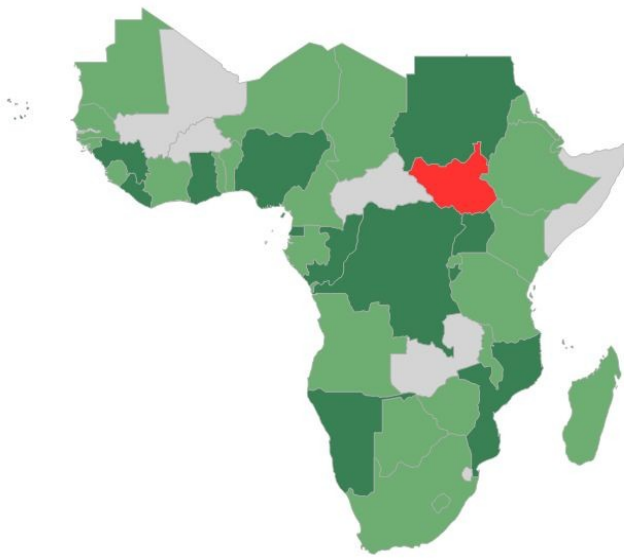
- ❖ Kenyan construction contractors have lobbied their government to protect domestic companies against Chinese construction firms. An ongoing rail project linking Mombasa and Nairobi worth an estimated USD2.6 billion is using Chinese contractors and being built to Chinese standards and likely will have a negative impact on Kenyan business perceptions of Chinese activities. In August 2012, thousands of Kenyan traders protested in Nairobi against Chinese business people whom they claim have taken over the small business sector.
- ❖ The Botswana Power Corporation in June 2012 accused the China National Electric Equipment Corporation of ignoring safety and environmental regulations at the construction of a new 500 mega-watt power plant and is now questioning the competency of Chinese contractors in Botswana.

Within states with substantial or burgeoning manufacturing industries, businesses are likely to increasingly view Chinese activities negatively because of greater competition against Chinese manufactured goods imports. Key examples include:

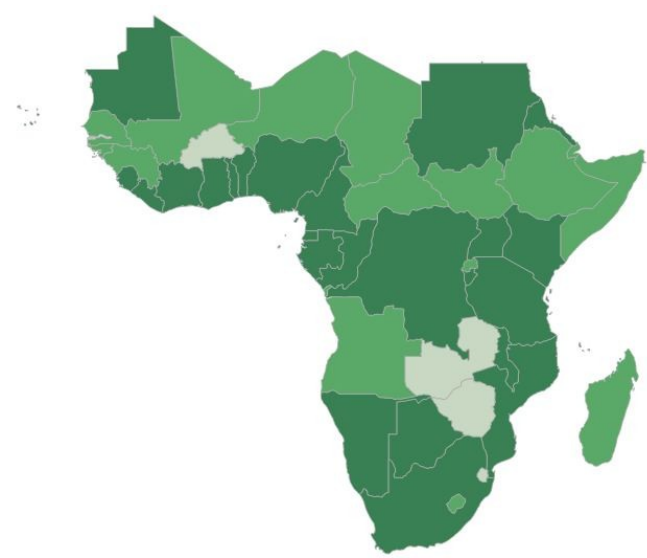
- ❖ According to a report from the University of East Anglia, 75% of Chinese market penetration into South Africa has negatively impacted domestic producers, and while absolute gains have been made in South African exports to other Sub-Saharan African states, the relative loss of market share to Chinese exports is approximately 10% and is highly likely to have a negative impact on business perceptions of Chinese activities.

- ❖ In Nigeria, according to the Nigerian Tribune, the textile industry has declined from 175 firms in the mid 1980's to 25 firms in 2011. This decline is widely attributed to competition from Chinese textile imports and has fomented negative business perceptions in Nigeria. Chinese firms have also started taking ownership of formerly Nigerian owned firms. In 2007, Nigerian textile exports totaled USD44 million and has decreased USD11 million in 2011.
- ❖ In 2005, the most recently available data for Lesotho, a report by the University of Addis Ababa noted that 90% of Lesotho's exports faced direct competition from Chinese exports around the world. This has been particularly harmful on Lesotho's apparel industry, which accounts for 18% of GDP, 70% of manufacturing, between 60% and 70% of exports, and employs 50% of the Lesotho workforce. The competition has forced 15 out of 42 apparel firms on the brink of closing. Additionally, only one of these firms is still owned by Lesotho citizens.

Political Key Findings



Map 5: Current estimate of political perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).



Map 6: Three to five year estimate of political perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).

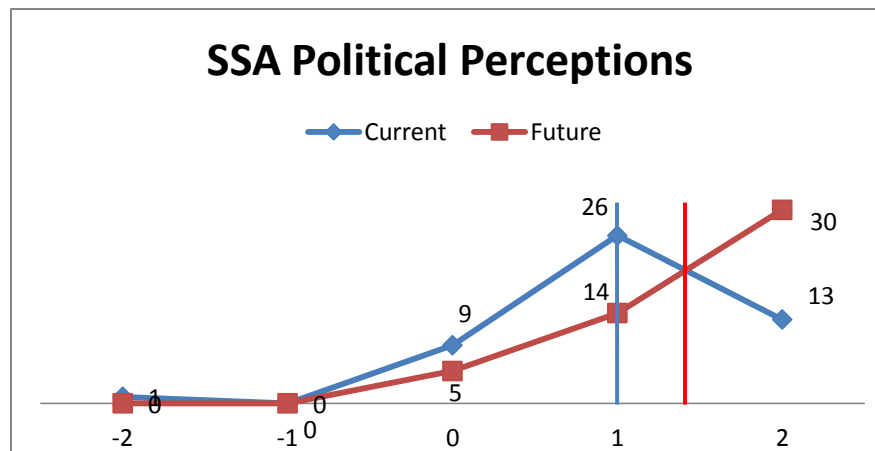


Figure 1: Number of states with: strong positive (2), weak positive (1), neutral or divided (0), weak negative (-1), and strong negative (-2) political perceptions of Chinese activity. The blue vertical line indicates the current average point while the red vertical line indicates the three to five year estimate average point.

It is highly likely that political elites' perceptions of Chinese activity in Sub-Saharan Africa will remain highly positive (44 out of 49, or 90% of countries) and improve over the next three to five years, while five countries will likely have neutral or divided perceptions. Twenty countries are likely to have a positive upward trend over the next three to five years and one with a downward trend. This is primarily due to extensive Chinese aid and development programs without conditions on human rights and good governance. Supporting country examples include:

- ❖ Omar al-Bashir, the current President of Sudan in 2009 said “We believe that the Chinese expansion was natural because we filled the space left by Western governments, the United States, and international funding agencies, with China, Malaysia, India, and other countries. The success of the Sudanese experiment in dealing with China without political conditions or pressures encouraged other African countries to look toward China.”
- ❖ The South Sudanese Information Minister Barnaba Mariel Benjamin told the BBC in April 2012 that the Chinese wanted to help develop the country and that “there are no strings attached to it.” These sentiments are likely to indicate increasing South Sudanese political sentiments toward Chinese activities.
- ❖ President Idriss Deby said about Chad-Chinese relations, “If the West does not want to invest in us, let the Chinese come. We welcome them. They don’t tell us what to do and they bring development. They are good partner.”
- ❖ Central African Republic President Francois Bozize stated that “Central Africa welcomes Chinese enterprises to come and invest and is supportive of bringing the bilateral relationship to new heights.”

Additionally, the perception of Chinese activity among political elites is likely not dependent on government structure within a Sub-Saharan African country. Supporting examples include, but are not limited to:

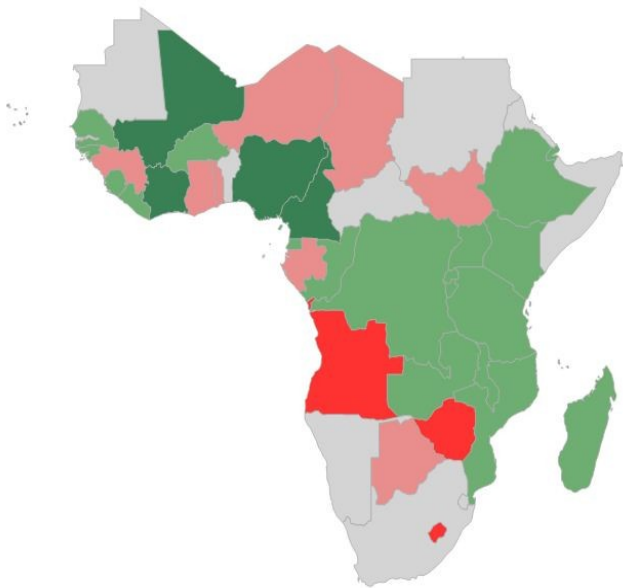
- ❖ The Cameroonian authoritarian president, Paul Biya, said that the government of Cameroon, its parliament, and political parties all hold positive attitudes toward its relationship with China and Biya has thanked the Chinese for its assistance and support which has contributed to stability and development. Freedom House’s rating of Cameroon is “not free.”
- ❖ The Ghanaian president, John Dramani Mahama, stated that Chinese investment is highly appreciated since Western assistance has been unreliable after the financial crisis. The main opposition leader told the BBC that Chinese investment in Ghana is “very welcome.” Freedom House’s rating of Ghana is “free.”
- ❖ Niger’s president Mahamadou Issoufou hopes that future cooperation between China and Niger can be extended to natural resource exploitation and infrastructure development. He stated that cooperation between Niger and China is a win-win partnership. Freedom House’s rating of Niger is “partly free.”

However, states that recognize Taiwan and those heavily dependent on China for trade and development are likely to have neutral or diminishing perceptions of Chinese activity and seek other relations.

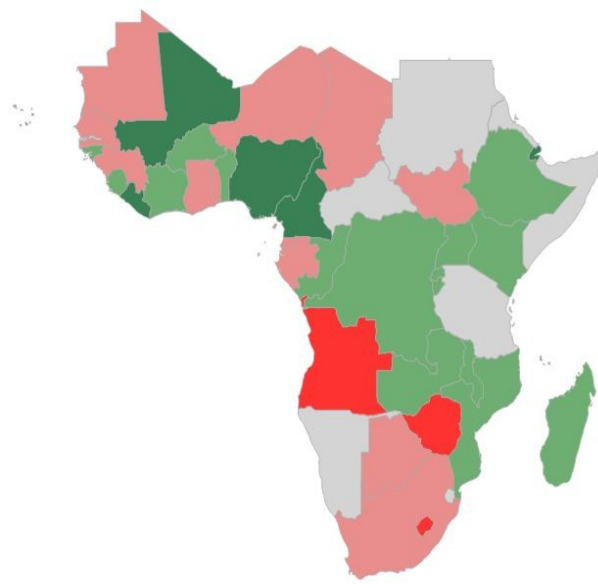
- ❖ After the 2009 coup and subsequent international backlash, Madagascar has become politically and economically dependent on China; the political elite are likely to amend relations with the West after the 2013 election.

- ❖ The interim government in Mali has been largely isolated since the March 2012 coup. However, China and other states have offered to help the government quell the Touareg rebellion in the north of the country. Should the interim government not call democratic elections in 2013, Chinese relations would be severely damaged and lead to negative perceptions.

Social Key Findings



Map 7: Current estimate of social perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).



Map 8: Three to five year estimate of social perceptions of Sub-Saharan African Attitudes toward Chinese activities. Countries are labeled from negative to neutral to positive (red to gray to green, respectively).

Saharan Africa are highly likely to become increasingly divided throughout most of Africa over the next three to five years with 24 (49%) countries likely to have positive perceptions of Chinese activities, 11 (22%) to have neutral or divided perceptions, and 14 (29%) to have negative perceptions. Further, it is likely that perceptions have a negative trend over the next three to five years, with seven Sub-Saharan African countries likely to have a negative downward social trend and three countries to have a positive upward social trend.

Social perceptions of Chinese activities are highly likely declining due to concerns over quality of Chinese imports and employment concerns associated with Chinese activities. Supporting examples include:

- ❖ While Zambian law restricts work shifts in mines to eight hours per day, Human Rights Watch reports that shifts in Chinese managed mines often range from 12-18 hours per day in unsafe conditions. Additionally, protests over pay at a Chinese mine in August 2012 led to Zambian miners killing a Chinese manager.
- ❖ According to the Botswanan newspaper The Monitor, locals use the term “quality from ‘Fong Kong’” to deride Chinese products for poor quality.

- ❖ According to a report by the Centre for East Asian Studies at the University of Madrid, Chinese firms in Equatorial Guinea bring an estimated 85%-95% of their labor from China. The study notes that this number is high, even in comparison to Chinese firms in other Sub-Saharan African states. A local Equatoguinean exemplified this discontent when he expressed his despair toward the Chinese: “It is so frustrating. I cannot even hit them, because, unlike us, the Chinese are extremely calm.”
- ❖ Dangerous imports from China, including sub-standard and fake medicines, powdered milk, and fire-prone electrical appliances have negatively impacted social perceptions of Chinese activities in Tanzania according to Cao Jiachang, the Deputy Director General for Tanzania’s Department of West Asia and African Affairs in the Ministry of Commerce.

However, the inflow of inexpensive Chinese goods filling gaps in the consumer market and the resulting increase in consumer purchasing power are key indicators of positive social perceptions of Chinese activities. Key exemplar countries include:

- ❖ In a 2008 poll, Cape Verdeans were asked to indicate how much China helped the country. 70% of respondents said China helped somewhat or a lot. Less than 1% said they had no impact. These numbers were similar in urban and rural populations. According to a study by Yale University, this is due to the influx of inexpensive Chinese goods increasing local Cape Verdean’s purchasing power which likely creates positive social perceptions of Chinese activities.
- ❖ In Cameroon, Fondo Sikod, a professor of economics at the University of Yaoundé states that “Chinese goods provide poorer Cameroonians with cheaper access to more goods and services. This is good for the well-being of the people.” It is likely that as local Cameroons have access to cheaper Chinese goods, social perceptions will improve.
- ❖ The Senegalese president said in an interview with La Parisien, in reference to China and India, “Their products are cheap, good quality, and it’s much easier to sign contracts with them.” It is likely that inexpensive Chinese goods in Senegal create positive social perceptions.

Development aid, for example medical or educational, is also a key indicator that is likely to positively impact social perceptions of Chinese activities in Sub-Saharan Africa. Key examples include:

- ❖ Since 2007, China has provided medical personnel, equipment, and pharmaceuticals to combat malaria in Comoros. In 2009, malaria was eliminated on the island of Moheli with a population of 36,000. In April 2012, China renewed its fight against malaria in the Comoros by donating additional equipment and anti-malarial drugs.

- ❖ The recent establishment of the Chinese Confucius Center in Rwanda has developed stronger social and cultural ties. According to the Inyange Girls School of Sciences, China constructed the school and supplied them with computers and other educational materials. Similar projects throughout Rwanda are likely to positively increase social perceptions of Chinese activities.
- ❖ According to a study by the Center for Strategic and International Studies, China's donation of over 30,000 tons of rice in August 2009 to Guinea-Bissau helped stem social unrest from rising food prices.

Additional Findings

Former Portuguese African colonies, or the lusophone countries, that are members of the Chinese Macau Forum for Economic and Trade Cooperation Between China and Portuguese-Speaking Countries are highly likely to have positive perceptions of Chinese activities across all three sub-groupings, with the exception of Angolan social perceptions. Members of the Macau Forum include Angola, Cape Verde, Guinea-Bissau, and Mozambique. These positive perceptions are in part due to the cultural and historical ties shared between China's Macau and the Portuguese African countries and the economic impact from development aid and trade facilitated by the Macau Forum.

- ❖ During Guinea-Bissau's war for independence from Portugal, future president and war hero João Bernardo Vieira was trained in guerrilla warfare by the Chinese. João Bernardo Vieira served as Guinea-Bissau's president from 1984 until 1999 and again from 2005 until 2009 when he was assassinated. Up until the April 2012 coup, the Chinese had also allegedly been providing military training to officials, according to a report by the Centre for Strategic and International Studies.
- ❖ In early 2011, Geocapital, a Chinese-Macau investment firm, partnered with local Guinean-Bissau partners to purchase a 60% share of Banco da Africa Ocidental (BAO), Guinea-Bissau's only major bank. The deal promised to provide greater access to lending for local businesses and likely increases business perceptions of Chinese activities.
- ❖ The Cape Verdean Minister of Economy and Tourism Humberto Santos de Brito in 2011 attended the Macau Forum and noted the positive effects of increasing trade with China on the Cape Verde economy and the success of the Macau Forum for developing countries.
- ❖ In October 2012, Cape Verde celebrated the 15th Lusofonia Festival, bringing together performances and cultural aspects from the Portuguese speaking countries and China. According to the Civic and Municipal Affairs Bureau (IACM), the event will allow "participants of different ages and tourists to have great fun and a touch of Chinese and Western cultures." The events across the Cape Verde were sponsored by the IACM and the Macau Forum.
- ❖ According to the Mozambican Central Bank Governor speaking at the Macau Forum in October 2012, both China and Mozambique benefit from bilateral cooperation in infrastructure, agriculture, fisheries, energy and mining industry. He additionally stressed the importance of Macau as the bridge between China and the Portuguese-speaking nations.

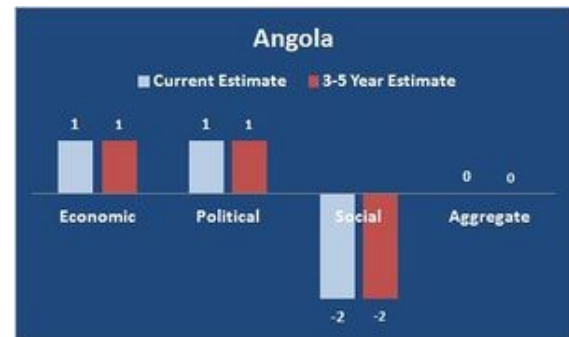
Country Reports

Angola

It is likely that Angolan views of Chinese activities in their country will remain divided over the next three to five years. Businessmen and politicians will likely have a weakly positive view of China, while citizens will likely have a strongly negative view.

Economic

It is likely that Angolan businessmen's view of China will remain weakly positive over the next three to five years due to high investment, especially in the oil sector.



- ❖ Increasing Chinese economic activity in Angola has forced Western companies to present better contracts to Angolan companies. As noted by an Angolan minister, “Our relations with China not only allowed us to obtain large loans, but most important it forced the West to treat us with more respect and in a less patronizing way. For that we are grateful.”¹
- ❖ In 2010, bilateral trade exceeded USD120 billion making Angola China’s largest trading partner in Africa.²
- ❖ The Economist Intelligence Unit reports that crude oil comprises 95% percent of Angola's exports.³ Angola Press reports that nearly 40% of Angolan oil goes is shipped to China.⁴
- ❖ Chinese loans and companies operating in Angola have contributed to an impressive resurgence in the country’s economy and infrastructure after nearly 30 years of civil war.⁵
- ❖ The Chinese have provided funding for strategic post-conflict infrastructure that Western donors do not fund. Chinese financing offers better conditions than commercial loans, such as lower interest rates and longer repayment time.⁶
- ❖ Chinese FDI in Angola increased from USD0.18 million in 2004 to USD101.11 million in 2010.⁷

However, there are factors that could foster a negative view of China

- ❖ A common criticism of China’s economic policy is that it is resource-driven and goal-oriented. Its means-to-an-end, non-interference approach can thus challenge Western countries’ hopes for democratic progress in Angola.⁸
- ❖ Small and medium scale traders resent the thousands of Chinese businessmen who are quickly putting them out of business.⁹
- ❖ There are arguments that importing cheap Chinese goods kills off local industry.¹⁰

Political

It is likely that Angolan politicians' view of China will remain weakly positive over the next three to five years due to China's willingness to deal with Angola without regards to preconditions.

- ❖ Trade between China and Angola comes with no strings attached, meaning there are no preconditions such as human rights or social standards.^{11 12}
- ❖ Chinese Prime Minister Wen Jiabao visited Angola in June 2006. Angolan President Eduardo dos Santos described bilateral relations as being mutually advantageous and pragmatic, having no political preconditions.¹³
- ❖ President dos Santos uses the wealth from oil to reconstruct the nation with Chinese workers, but at the same time Angolans continue to complain about unemployment.¹⁴

However, there are indications that Angola does not want to become too dependent on one country

- ❖ China's growing role in Angola has generated debate and speculation. President dos Santos stressed that the Angolan government plans to reinforce its bilateral and commercial relationships with other countries.^{15 16 17}
- ❖ While China remains, and is likely to remain, the country's main economic partner, the dos Santos government has strengthened diplomatic and security ties with the United States, Europe, Brazil, and other Asian powers, such as India.¹⁸

Social

It is likely that Angolan citizens' strongly negative view of China will remain strongly negative over the next three to five years due to harm to employment and increased crime from Chinese workers.

- ❖ There are accusations that government officials are privately benefitting from deals with China.¹⁹
- ❖ There is resentment toward China among the lower classes.²⁰ This is partly due to Chinese companies, along with their employees and materials, receiving most development contracts.²¹
- ❖ According to Lucy Corkin of the University of London in Johannesburg, Chinese companies are reluctant to hire local laborers, and tend to bring in labor from China. This has resulted in rising discontent among job-seeking Angolans as Chinese companies do not benefit local employment.²²
- ❖ Chinese-constructed town outside of Luanda which is unaffordable for most Angolans
- ❖ Angolan elites are growing more concerned over their self-created overdependence on China and have begun to take steps to balance Chinese dominance.²³
- ❖ In August 2012, 37 Chinese were extradited from Angola for crimes against other members of the Chinese community. The police broke up 12 Chinese criminal gangs.²⁴
- ❖ Chinese companies in Angola, especially construction companies, tend to pay the lowest wages. Chinese companies reportedly deny maternity leave in violation of local labor laws.²⁵



A Chinese-constructed ghost town outside of Luanda, unaffordable for most Angolans

- ❖ China International Trust and Investment Corporation constructed a USD3.5 billion, 5,000 hectare residential complex outside Luanda. The project has given jobs to local Angolans, but the average Angolan cannot afford an apartment. Less than 10% of apartments have been rented out. Some accuse the government of corruptly profiting off of the project.^{26 27 28}

However, there are factors that could improve the citizens' view of China

- ❖ Although not easily measured, Chinese investment has contributed to poverty reduction in Angola.²⁹
- ❖ China has established municipal construction, technical cooperation, and anti-malaria agreements.³⁰

Analytic Notes

Source Reliability: Medium

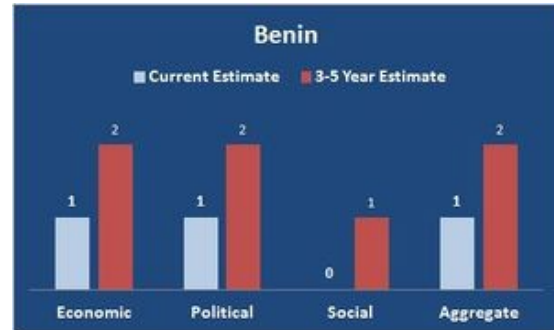
Analytic Confidence: Medium

Benin

It is likely that Beninese views of Chinese activities will improve positively over the next three to five years among all three sub-groups.

Economic

Beninese businessmen's weak positive view of China is likely to improve to strong positive over the next three to five years due to heavy investment in infrastructure and development of key industries.



- ❖ China has invested heavily in Benin's infrastructure. On 4 February 2011, China invested USD288 million in road construction projects.³¹ During President Boni's September 2011 visit to China, he signed a USD34 million loan for road construction, the cotton industry, and anti-piracy measures.³² Secretary General Eugene Dossoumou also reported that the China Civil Engineering Construction Corp. will invest USD10 billion to build roads and extend a railway.³³
- ❖ Beninese politicians have supported agro-fuel programs to boost economic development and reduce dependence on foreign sources of energy.³⁴ China appears willing to meet the government's goal with heavy investment in agriculture.
- ❖ China is using 4,800 hectares of land to develop 50 million liters of bio-fuel ethanol annually.^{35 36}
- ❖ Chinese businesses are investing USD2.15 million in Benin's palm oil production over the next 4 years. The project requires 10,000 hectares.³⁷
- ❖ China's Ministry of Commerce pledged to develop cotton production in Benin and other West African countries.³⁸
- ❖ China will likely raise imports of cotton from Benin as its consumption rises and new World Trade Organization regulations make it easier for poor nations to trade with rich nations. China has pledged to give "seeds, machinery, fertilizer and other materials to help promote cotton planting in the African countries."³⁹
- ❖ Brilliance China Automotive Holdings is to develop a USD46 million auto plant in Benin.⁴⁰

However, factors such as the trade deficit could negatively affect business' view of China. Some have criticized the economic relationship

- ❖ The peasant union Synergie Paysanne is strongly opposed to the farmland rush due to land access and food sovereignty issues. The union supports more traditional farming techniques among local farmers.⁴¹
- ❖ Benin's trade deficit with China is estimated from over USD150 million⁴² to nearly USD2 billion.⁴³ The deficit is due to Chinese imports such as textiles and garments, electrical machinery, industrial products, consumer goods, and home appliances.⁴⁴
- ❖ Chinese Foreign Direct Investment in Benin is unstable and has widely fluctuated over the past six years. It reached highs of USD14 million in 2004 and 2008 and a low of zero in 2006.⁴⁵

- ❖ Jacques Ayadji, head of Benin's national union of transport and public works, denounced Chinese involvement in the infrastructure sector, saying, “Benin-Chinese cooperation, in its current form, does not protect the people of Benin and its economy, which is thus delivered without defense to allow Chinese imperialism to march on.”⁴⁶
- ❖ Beninese textile industries view China negatively because of “Wholesale and retail sale by the same importer; imitations of trademarks such as Vlisco, Super Wax and Madras; anarchic reduction of prices; and illegal importing.” In late 2001, the Ministry of Commerce stepped in and banned Chinese from retailing and restricted them to wholesale, indicating the government will take measures to protect Beninese business interests.⁴⁷

Political

Beninese politicians’ weak positive view of China is likely to improve to strong positive over the next three to five years due to mutual calls for increased cooperation.

- ❖ Benin has historically strong political ties with China. In 1972, General Mathieu Kérékou took power in Benin in a Marxist-Leninist coup and reestablished relations with the PRC. He reportedly admired the PRC and Mao Zedong and adopted Mao’s style of dress. Relations strengthened beginning in 2004 with a series of high-level official visits.⁴⁸
- ❖ On 13 September 2011, Beninese President Yayi Boni visited Chinese President Hu Jintao in China and expressed thanks for infrastructure and economic development. Boni expressed support for the One-China policy.⁴⁹ Boni was reelected in March 2011 and will stay president until 2016.⁵⁰
- ❖ On 20 June 2012, Boni again visited Hu in Beijing where both pledged to boost cooperation.⁵¹

Social

Beninese citizens’ neutral view of China is likely to improve to weak positive over the next three to five years due to increased Chinese cultural exchanges.

- ❖ Beninese citizens are estimated to have a neutral view of China because there is a lack of information on societal opinions. Beninese news sources contain few opinion pieces on China and few stories relating to Chinese-Beninese relations. There is little information on Chinese people working or living in Benin.
- ❖ The first Chinese Culture Center in Africa opened in Benin in 1988. The Center offers exhibitions, performances, concerts, and Chinese language courses.⁵²
- ❖ In the past year, Benin's Minister of Culture said Beninese people like watching Chinese martial arts films⁵³ and supports the Culture Center as a means to spread knowledge of Mandarin and attract Chinese tourists.⁵⁴
- ❖ In June 2012, Benin’s Cinematography Administration expressed hope to collaborate more with China to produce films.⁵⁵

Analytic Notes

Source Reliability: Medium

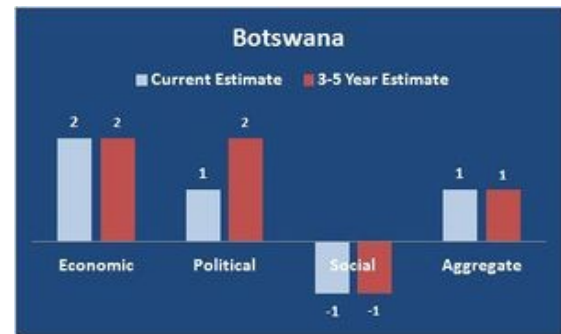
Analytic Confidence: Medium

Botswana

It is likely that Botswanan businessmen and politicians' views of China will improve strongly and that Botswanan citizens' views will decrease weakly over the next three to five years.

Economic

It is likely that the strongly positive view of Botswana businessmen toward China will remain strongly positively over the next three to five years due to increased Chinese investment in infrastructure and prominent industries and due to Chinese growth as a potential market for Botswanan goods.



- ❖ Botswana's Minister of Finance and Development Planning invited Chinese investors to invest in the textile and manufacturing industries.⁵⁶
- ❖ Botswana reportedly holds control over the plans of infrastructure projects completed by the Chinese, and China appears open to renegotiation. Botswana reportedly chooses investments opportunities that do not harm the manufacturing sector.⁵⁷
- ❖ China State Construction Engineering Corp. has built roads, an embassy, hospitals and schools in Botswana since 1988. The director has lived in the country since 1991.⁵⁸
- ❖ China represents a huge market for Botswana's diamond trade. Chinese demand for diamonds recently overtook Japanese demand. China has reduced tariffs and granted tax exemptions in order to expedite diamonds imports from Botswana.⁵⁹
- ❖ The CEO of a major Botswanan bank praised Chinese involvement in trade, infrastructure, and investment. The bank has produced products to facilitate trade between the two countries, such as International Trading Accounts and yuan ATM withdrawals.⁶⁰
- ❖ Botswana Export Development and Investment Authority hosted a seminar with a Chinese delegation to tout the benefits of business partnership with Botswana.⁶¹
- ❖ Chinese Foreign Direct Investment in Botswana has risen drastically since 2004.⁶²

However, Botswanan businessmen could develop concerns with poor construction and bribery

- ❖ The competency of Chinese construction companies was called into question recently when the Morupule B power plant, constructed by and largely manned by the Chinese, went through a slew of safety and environmental problems. The plant is supposed to provide enough electricity to power all of Botswana.^{63 64}
- ❖ Three managers of a Chinese construction company attempted to bribe a Botswanan civil servant to overlook poor work on a local school. The managers were charged and subsequently fired by the construction company.⁶⁵ In another instance, two Chinese accused of attempting to bribe police officers were brought to court.⁶⁶

Political

It is likely that Botswanan politicians' weak positive view of China will improve to strong positive over the next three to five years due to pledges for increased engagement with China.

- ❖ China and Botswana currently enjoy friendly political relations. Botswana and China established diplomatic relations in 1975 and since then Botswana has adhered to the One-China policy and exchanged high-level official visits with China. Every Botswanan president has visited China.⁶⁷

- ❖ On 3 July 2010, the Chairman of Botswana Democratic Party met Chinese Vice President Xi Jinping in Beijing, where both pledged to “further deepen exchanges and cooperation.”⁶⁸ On 21 November 2010, Vice President Xi visited Botswana to sign three cooperation deals, including one offering USD6 million for development. Xi also toured Diamond Trading Company Botswana.⁶⁹
- ❖ Botswana's government saves substantially by contracting inexpensive Chinese projects and can transfer the benefits to the taxpayers. It is estimated that the government saves one-fourth to one-third.⁷⁰
- ❖ Botswana's Vice President and former Minister of Foreign Affairs highly values relations with China. He admires the diligence of China's economy and their investment in Botswana.⁷¹
- ❖ The Chinese ambassador to Botswana emphasized “mutual benefit” as the key factor in future China-Botswana relations. He said China should invest in the manufacturing center to close the trade deficit as Botswana continues to export minerals and agricultural products to China.⁷²

However, Botswana's view of democracy and human rights could have a negative effect on the relationship

- ❖ Botswana is classified as a free, electoral democracy by Freedom in the World 2012.⁷³ The Botswanan government criticized China and Russia for blocking efforts to reach a peaceful solution in the Syrian conflict.^{74 75}

Social

It is likely that Botswanan citizens' weakly negative view of China will remain weakly negative over the next three to five years due to the low quality of Chinese goods and employment tensions.

- ❖ Chinese goods and construction projects are criticized as being low quality.⁷⁶ Botswanans use the term “quality from Fong Kong” to deride Chinese products.⁷⁷
- ❖ A local artist even wrote a song about how Chinese goods turn out to be counterfeit or low quality. There have been calls for the government to instead invest in manufacturing, refineries, water, and farming.⁷⁸
- ❖ Chinese companies are criticized for not hiring local workers, but they are often not skilled enough to work on certain projects. The language and cultural barrier between Chinese managers and Botswanan workers has caused tension and misunderstanding.⁷⁹
- ❖ The Botswana Gazette called for government review of Chinese involvement in the country.⁸⁰

However, China has engaged in social programs that benefit the public

- ❖ China and Botswana have pledged to work together to alleviate poverty.⁸¹
- ❖ China has sponsored 22 Botswanan students to study in China.⁸²
- ❖ Two Chinese contractors constructed six houses for poor villagers.⁸³



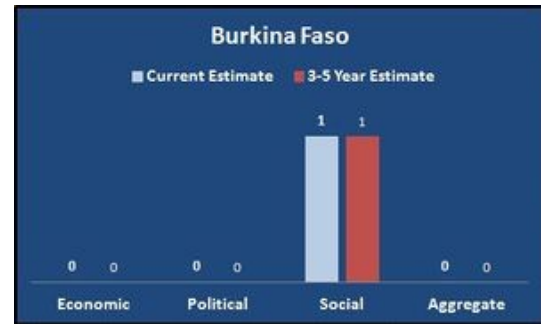
Analytic Notes

Source Reliability: Low

Analytic Confidence: Medium

Burkina Faso

It is highly likely that over the next three to five years Burkina Faso will have a weakly positive view of Chinese activities, primarily due to weak positive social perceptions combined with neutral political and business sentiments.



Economic

Little direct interaction between China and Burkina Faso makes it highly likely that Burkinabe businesses will continue to view Chinese activities neutrally over the next three to five years. Key supporting arguments include:

- ❖ There is no reported Chinese FDI or FDI stocks in Burkina Faso, likely connected to the lack of diplomatic relations between the two countries.⁸⁴
- ❖ Trade data is limited and contradictory. Different sources indicate both a trade surplus and deficit for Burkina Faso with China.^{85 86} The best estimate is that Burkina Faso imports USD110 million from China, representing 18.1% of imports, and exports approximately USD52 million to China, creating a trade deficit.⁸⁷

However, an important sector that likely views Chinese activities and a relation positively is the cotton industry. As a substantial portion of Burkinabe exports to China, the cotton trade has benefited greatly from Chinese purchases.⁸⁸ Cotton prices have been decreasing in 2012, and China has indicated it will decrease cotton imports, potentially decreasing the cotton industry's positive view of China.^{89 90 91}

Political

Little interaction between China and Burkina Faso makes it likely that Burkinabe politicians' view of Chinese activities will remain neutral for the next 3-5 years. It is also highly likely that Burkina Faso will continue to recognize Taiwan over mainland China for the next three to five years.

- ❖ In 2004, Burkina Faso cut diplomatic ties with the PRC in favor of the ROC. This decision appeared to be primarily economic, with Burkina Faso receiving USD32 million from Taiwan immediately following recognition.⁹²
- ❖ Taiwan continues to provide over 8% of Burkina Faso's international aid, and Taiwanese President Ma has promised to continue to increase aid as recent as April 2012.^{93 94}
- ❖ In an April 2012 meeting between President Ma and Burkinabe President Blaise Compaore, President Compaore expressed his deep gratitude for Taiwanese aid and recounted a number of social, economic, and cultural exchanges between the two since 2004.⁹⁵

Though Burkinabe politicians are likely to continue to view Chinese activities neutrally, rising trade between Burkina Faso and China suggest a possible rise in positive views toward China.

- ❖ Although much of the trade data between Burkina Faso and China is unreliable, multiple sources do indicate that trade has increased substantially over recent years, making China a tempting new market for Burkinabe raw materials such as cotton and gold.^{96 97}

Social

Burkinabe citizens' views of Chinese activities are likely to remain weakly positive for the coming 3-5 years, primarily in urban areas.

- ❖ In a 2008 poll, Burkinabe citizens were asked to rate how helpful China is in the country. 55% of respondents said China helped somewhat or a lot, although only 40% of rural citizens agreed. Urban citizens had a generally higher view of Chinese activities.⁹⁸
- ❖ Trade with China has been increasing, primarily in the manufacturing sector. Thus, many Burkinabe have greater access to cheaper goods.^{99 100}

Although likely to remain positive, certain trends indicate possible negative sentiments growing among local Burkinabe.

- ❖ While 55% of respondents agreed China is a lot or somewhat helpful, 37% of respondents said they did not know enough about China to say, with 44% of rural citizens responding the same.¹⁰¹
- ❖ While increasing trade bodes wells for Burkinabe views of Chinese in the short term, an expanding trade deficit has the potential to diminish positive views in the African country.¹⁰²

Analytic Notes

Source Reliability: High

Analytic Confidence: High

Burundi

It is highly likely that over the next three to five years Burundi will maintain strong positive perceptions of Chinese activities through all three sub-groupings.

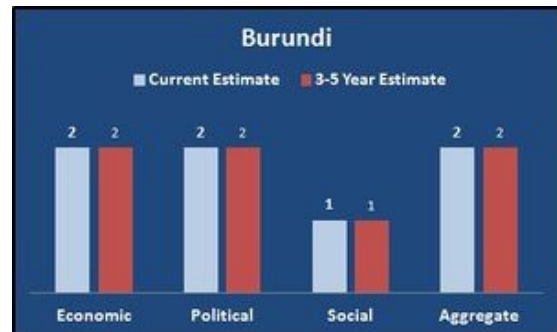
Economic

Burundian businesses' strong positive view of Chinese activities is likely to remain strongly positive for the next three to five years, especially for the agricultural sector. Key supporting facts include:

- ❖ At the Fifth Ministerial Meeting of Forum on China-Africa Cooperation in July 2012, Victoire Ndikumana, Burundi Trade Minister, speaking about the Chinese effects of the Burundi economy said, “The support of China is an innovative one, that no tied conditions it’s a friendly support and we do appreciate.”¹⁰³
- ❖ Mr. Como Manirakiza, Burundian Minister of Energy and Mines, in October 2012 welcomed the efforts of the Chinese company Huawei Technologies in developing clean and renewable energy, such as solar energy. The Minister said renewable energy represents a huge potential for a country like Burundi and Huawei has spared nothing to carry out the work on time.¹⁰⁴
- ❖ China has additionally aided in joint textile mills, highways, electricity projects, and handicraft training programs in Burundi.^{105 106 107}
- ❖ Burundi faces little export competition from China due to the fact that their primary exports are agricultural.¹⁰⁸ To assist in improving agricultural output, China has sent agricultural engineers to assist local Burundians.¹⁰⁹
- ❖ Reports suggest the China Civil Engineering Construction Corporation and the China Roads and Bridges Company are interested in developing a railroad system connecting Tanzania, Kenya, Rwanda, and Burundi.^{110 111}
- ❖ The Chinese ZTE Corporation is working cooperatively with local Burundian companies to install fiber optic cables throughout the country, likely making business and communication easier and more cost effective.¹¹²

Despite the potential for sentiments to remain positive, factors such as FDI and trade deficits suggest a potential for decreasing positive views.

- ❖ Current Chinese FDI stocks in Burundi remain low at less than 1% of Chinese FDI in Africa. However, even this may become a positive point, as FDI stocks have been increasing since 2008.¹¹³
- ❖ The trade deficit between Burundi and China remains, totaling approximately USD30 million in deficits, or around a 70% deficit.^{114 115}

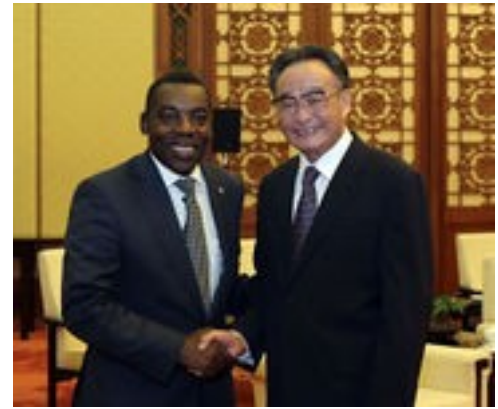


Political

The strong positive views of Burundi politicians toward Chinese activities are highly likely to remain strongly positive and indeed improve over the next three to five years.

- ❖ Burundian politicians, specifically Trade Minister Victoire Ndikumana, have praised China’s no strings attached policy when providing aid.¹¹⁶
- ❖ In November 2011, China donated USD80,000 to fund the Burundian Senate.¹¹⁷

- ❖ Further Chinese aid has included medical equipment, facilities, trained professionals, food, and the only functioning planes for Air Burundi.^{118 119 120 121}
- ❖ In October 2012, China provided military equipment and has possibly provided training in recent years.^{122 123 124}
- ❖ Since 2011, a number of high level meetings between Chinese and Burundian officials have increased positive rhetoric of Burundian politicians toward Chinese activities in Burundi.
- ❖ Burundi Ambassador to China in March 2011: "We all know that today's China was very powerful and China and Burundi's relationship is very friendly, so we particularly welcome Chinese enterprises to invest in Burundi." He continued to lay out ways in which Burundi welcomes Chinese investment and companies.¹²⁵
- ❖ In May 2012, the Second Vice President of Burundi led a delegation to China to express his "deep appreciation" of China's achievements and met with a number of businesses with subsidiaries in Burundi.¹²⁶
- ❖ In September 2012, Burundi's Senate Speaker Gabriel Ntisezerana spoke to top Chinese political advisor Jia Qinglin and expressed gratitude for China's support and assistance in its development, and said Burundi will make concerted efforts with China to deepen cooperation and the bilateral relations.¹²⁷



Top Chinese legislator Wu Bangguo, right, meets with visiting Burundi's Senate Speaker Gabriel Ntisezerana on 4 September 2012 in Beijing

Social

Burundian views of Chinese activities are likely to remain weakly positive over the next three to five years, particularly in rural areas.

- ❖ In 2011, a Chinese funded hospital was completed in the rural region of Bubanza Province and maintains its staff and upkeep of equipment. China has also provided medical teams for Burundi since 1987.¹²⁸
- ❖ In April 2012, China donated USD200,000 worth of medical vehicles to help Burundi combat AIDS.¹²⁹
- ❖ China's Hope Project has expanded in Burundi, providing funding for the construction of primary schools in Burundi.^{130 131}
- ❖ Additional aid from China included food aid and the development of a handicraft training center which provides training for locals.^{132 133 134}
- ❖ A lecturer at the University of Burundi recently told Chinese news that "the win-win policy promoted by China in Africa is real if we look at unconditional support or loans that African countries get from China."¹³⁵ He continues to add that Chinese development should be a role model for African countries.¹³⁶

However, poor trade relations could potentially create negative sentiments among local Burundians toward China's continued presence in the country.

- ❖ Due to a trade imbalance of approximately USD30 million, or around 70%, it is possible that views of Chinese could diminish.^{137 138}

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Cameroon

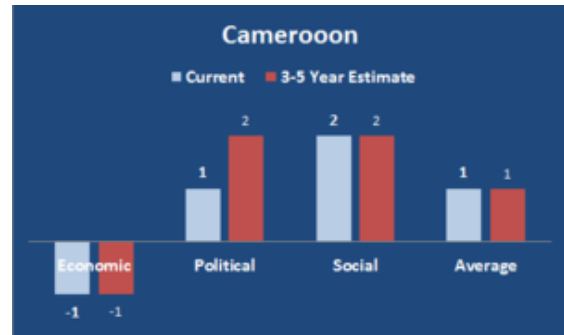
Positive perceptions of Chinese activity in Cameroon among the populace are likely to improve with a weak upward trend over the next three to five years while political elites' perceptions are likely to improve with a strong upward trend. Negative perceptions among businesses of Chinese activity are likely to continue declining with a weak downward trend.

Economic

The negative perception of Chinese activities in Cameroon by domestic businesses is likely to continue declining over the next three to five years as business opportunities decline due to increased Chinese imports and business expansion.

- ❖ Increasing trade deficit between Cameroon and China.^{139 140}
- ❖ Cameroonian exports to China are dominated by raw goods (cotton, oil, lumber)¹⁴¹ while Chinese imports are largely finished goods, hindering domestic manufacturing capabilities.^{142 143}
- ❖ Chinese involvement in Cameroonian retail market further aggravates Cameroonian Small to Medium Enterprises (SME) development and contributes to unemployment.¹⁴⁴
- ❖ Chinese construction companies are awarded the majority of infrastructure projects at the expense of domestic enterprise.^{145 146 147}
- ❖ The lack of conditions associated with Chinese aid to Cameroon reduces the willingness of the regime to reform and protect domestic industry and business.¹⁴⁸

Conversely, Chinese involvement in the economy may assist some Cameroonian business. Cameroonian firms may benefit from inexpensive Chinese inputs for manufacturing; this is largely seen among firms not currently competing against Chinese finished goods.¹⁴⁹



Politics

It is likely that the political elites of Cameroon will increasingly view Chinese activities positively over the next three to five years due to the following.

- ❖ A lack of conditions connected to Chinese developmental aid amid lengthy conditionals for Western aid.¹⁵⁰
- ❖ President Biya recently secured a 467 million USD loan from Chinese Exim bank for development projects.¹⁵¹
- ❖ Chinese aid to Cameroon's authoritative regime indirectly weakens the potential for democratic reforms and garners support from Biya.¹⁵²
- ❖ China cancelled USD32 million of Cameroonian debt in 2007 and USD34 million of Cameroonian debt in 2001.^{153 154}
- ❖ Conversely, the following complicates closer political relations and positive perceptions of Chinese activity.
- ❖ Cameroon maintains close ties with its former colonial power, France.¹⁵⁵
- ❖ Cameroon is a member of the CFA Franc monetary bloc which furthers ties with France and other former French colonies in Central Africa.¹⁵⁶

Social

It is likely that the positive social perceptions of Cameroonians toward Chinese activities will continue to improve slightly over the next three to five years, though at a slow rate due to Chinese involvement in development and efforts to extend the benefits to the populace.

- ❖ While an estimated 40% of the population lives below the poverty line,¹⁵⁷ inexpensive Chinese goods increase the purchasing power of Cameroon's poor.¹⁵⁸
- ❖ Chinese aid programs and companies have built two schools, several hospitals, and provided medical equipment and personnel since 2006.¹⁵⁹
- ❖ Cultural exchange programs, including annual scholarships for Cameroonian students to Chinese universities¹⁶⁰ and a Chinese language program have garnered support for the increased Chinese visibility in the country.¹⁶¹
- ❖ The Cameroonian government has established the National Employment Fund to promote Cameroonian employment by Chinese construction companies.¹⁶²

However, Chinese actions in Cameroon may negatively affect domestic perceptions of China due to its indirect support of the authoritarian regime.

- ❖ Chinese aid programs have indirectly supported the authoritarian regime of President Paul Biya¹⁶³ and have negatively affected personal and business liberties.¹⁶⁴
- ❖ Infrastructure projects funded by the Chinese largely contract Chinese firms, which negatively impacts both technology transfer and domestic employment.^{165 166}
- ❖ Increased competition with Chinese imports will negatively affect social and economic development opportunities.¹⁶⁷

Analytic Notes

Source Confidence: Medium

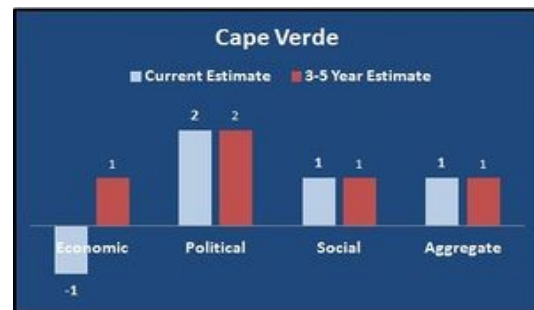
Analytic Confidence: Medium

Cape Verde

Over the next three to five years, it is likely that Cape Verde will have an overall positive view of Chinese activities and in all three sub-groups.

Economic Narrative Report

Cape Verdean business perceptions of Chinese activities are likely to increase positively over the next three to five years, particularly for larger industries such as tourism, boating, and port industries. The increased perceptions are owed to increased Chinese investments into Cape Verde's tourism and port industries. Many local Cape Verdean businesses also benefit from the recent influx of Chinese businesses. Conversely, Chinese businesses have a negative impact on small Cape Verdean business perceptions as competition increases.



In 2011, Cape Verde's Minister of Economic and Tourism Humberto Santos de Brito attended the Macau Forum for Economic and Trade between China and Portuguese-speaking countries and noted the positive effects of increasing trade with China on the Cape Verde economy and the success of the Macau Forum.¹⁶⁸ In a 2009 meeting with Chinese officials, Minister Santos de Brito additionally made one of the strongest appeals for Chinese investment between the two countries. He called Cape Verde a "secure and competitive platform for entry of Chinese products into West Africa, as well as the provision of services to the Chinese fishing and mercantile fleets in the Atlantic."¹⁶⁹ The Macau Forum has become particularly important for the Portuguese speaking African countries and in particular Cape Verde. Dr. Santos de Brito is still currently serving as Minister of Economy and Tourism for Cape Verde.¹⁷⁰



Cape Verde President Jose Maria Neves attending the Macau Forum in July 2012

In a number of 2011 and 2012 agreements, Chinese officials have agreed to invest in infrastructure, higher education, port development, and medical facilities.^{171 172 173} China also provided funding to build the Cape Verdean parliament building, national stadium, the country's first dam, and previous medical facilities at an estimated USD5 million in 2005. Much of the construction was completed by Cape Verdean companies, and if this continues will greatly assist local business.¹⁷⁴ In recent months, a number of high profile Chinese businessmen have promised large investments to boost tourism, including amusement parks and casinos.^{175 176} Chinese government officials have additionally discussed further aid to boost Cape Verdean tourism, a booming industry for the small island nation.¹⁷⁷ Many local Cape Verdean property renters also benefit from charging higher rents from Chinese small businesses.¹⁷⁸

However, this influx of small Chinese businesses has also had a negative impact on Cape Verdean business perceptions, particularly among competing small businesses. Chinese small businesses in Cape Verde currently range from 200 to over 300 and directly compete with local Cape Verdean small businesses, offering cheaper prices on goods and forcing many out.¹⁷⁹

¹⁸⁰ The Cape Verde government also offers foreign businesses a grace periods of five to ten years of no taxes on profits, dividends, and some imports.¹⁸¹ Local businesses are taxed at much higher rates and face tariffs when exporting to China.¹⁸²

Political

Cape Verdean politicians' strong positive views of Chinese activities are highly likely to remain strongly positive over the next three to five years. Key supporting facts include:

- ❖ Cape Verdean Prime Minister Jose Maria Pereira Neves stated in 2009 that "The relationship between China and Cape Verde has been long and positive. It was initially established 33 years ago, but only on a political level. Since then it has matured into a strong economic and commercial bond." He also has stated that he desires Cape Verde to become an international hub where Chinese businesses will benefit enormously.¹⁸³
- ❖ More recently at the July 2012 Forum on China-Africa Cooperation (FOCAC) meeting in Beijing, Neves stated that Cape Verde continues to strongly support the One-China Policy.¹⁸⁴
- ❖ Prime Minister Neves stated that he and his country expect China to play a bigger role in Africa in the future and Cape Verde will act as an important gateway connecting China and West Africa.¹⁸⁵
- ❖ Additionally at the 2012 FOCAC meeting, China pledged USD20 million in donations and interest free loans to Cape Verde.^{186 187}

No negative Cape Verdean political attitudes could be identified. Further, there is more evidence to support Cape Verdean politicians' positive view of China.

- ❖ The opposition, center-right party called Movement for Democracy (MPD) congratulated China in 2007 for its tremendous success.¹⁸⁸ Opposition presidential candidate Carlos Veiga also stated in his 2006 campaign he desired stronger ties with China.¹⁸⁹
- ❖ Reports have recently arisen that China is in talks to donate military equipment to Cape Verde.¹⁹⁰

Social

Cape Verdean citizens, both rural and urban, are likely to continue to view Chinese activities in Cape Verde as weakly positive over the next three to five years. Key supporting facts consist of:

- ❖ In October 2012, Cape Verde celebrated the 15th Lusofonia Festival, bringing together performances and cultural aspects from the Portuguese speaking countries and China. According to the Civic and Municipal Affairs Bureau (IACM), the event will allow "participants of different ages and tourists to have great fun and a touch of Chinese and Western cultures." The events across the Cape Verde were sponsored by the IACM and the Macau Forum.^{191 192}
- ❖ In a 2008 poll, Cape Verdeans were asked on whether China helped the country. 70% of respondents said China helped somewhat or a lot. Less than 1% said they had no impact. These numbers held for urban and rural, male and female respondents.¹⁹³
- ❖ The influx of cheap Chinese goods to local shops has increased local purchasing power.^{194 195}
- ❖ Cape Verde has a long history of Cape Verdeans emigrating elsewhere for better lives and therefore have a high understanding and acceptance of local immigrants.^{196 197 198}
- ❖ Additionally, over 3000 Chinese live in Cape Verde, making it the second largest immigrant community after Portuguese.^{199 200}

However, tensions do exist between Chinese activities in Cape Verde and the local Cape Verdeans.

- ❖ Although Chinese stores often hire locals, wages are substantially lower and treatment is often poor.^{201 202}
- ❖ High support for democracy and human rights has been shown to correlate with a negative view of Chinese.²⁰³ Cape Verdeans have an extremely positive view of democracy and high support for democracy.^{204 205} However, further polls note that a majority of Cape Verdeans either view China as a democracy or do not know enough about Chinese politics to say.²⁰⁶
- ❖ A high trade imbalance with China has been shown to correlate with a negative view of Chinese. Cape Verde has a substantially high trade imbalance with China, approximately 99%.²⁰⁷ However, Cape Verde has a minimal manufacturing base that competes with cheap Chinese imports.²⁰⁸

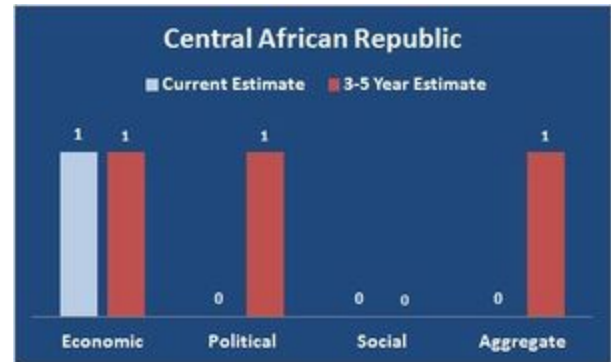
Analytic Notes

Source Reliability: High

Analytic Confidence: High

Central African Republic

It is likely that the overall perception of Central African Republic toward Chinese activities will be weakly positive over the next three to five years due to the positive political, social, and economic perceptions.



Political

- ❖ Central African President Francois Bozize urged China Thursday to invest more in his nation and develop stronger ties in the energy and mining fields, state media reported.²⁰⁹
- ❖ Bozize stated that "Central Africa welcomes Chinese enterprises to come and invest and is supportive of bringing the bilateral relationship to new heights."²¹⁰
- ❖ China has been an active investor in the Central African Republic involving health, agriculture, communications and trade.²¹¹

Economic

- ❖ China is one of CAR's main trading partners, accounting for 16.4% of their exports in 2011.²¹²
- ❖ China has expressed its interest in the CAR, despite the country's lack of natural resources. According to BBC News, China appears unaffected by the unpromising business climate in the CAR and continues to establish itself in the country.²¹³
- ❖ Burdened with huge infrastructural problems and a desperately weak economy, the CAR would like China to do more in their economy and business sector.²¹⁴
- ❖ In 2011, CAR and China signed a USD30.6 million deal to complete the construction of a ten megawatt power plant that would increase power supply to the capital. This deal would encourage foreign investors to work with the CAR by exploiting its natural resources.²¹⁵

Social

- ❖ In 2010, there were a number of political exchanges between China and the CAR including Wang Jiarui, Minister of the International Department of the CPC Central Committee, who visited the CAR in January. Also, in December, Yang Jing, Special Envoy of President Hu Jintao and Chairman of the State Ethnic Affairs Commission of China, visited the CAR to celebrate the 50th anniversary of their independence.²¹⁶
- ❖ Since the beginning of their relations, progress had been made to strengthen business, trade, infrastructure development, health, and media advertisement in the CAR.²¹⁷
- ❖ In 2009, the CAR hosted an African-Chinese friendship week in collaboration with the Chinese embassy in the capital, Bangui. The Chinese embassy wanted locals to know and better understand China in a fairer, impartial way. Compared with countries like Sudan and Angola, the CAR is a much less valuable economic partner for China, which demonstrates China's genuine support for the overall well-being of the CAR.²¹⁸

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Chad

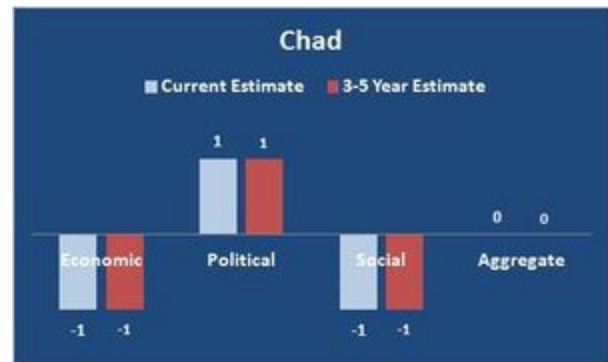
It is likely that the overall perception of Chad toward Chinese activities will be weakly negative over the next three to five years, with business and social perceptions remaining strongly negative and political perceptions being strongly positive.

Economic

Business perceptions likely to remain strongly negative in three to five years due mainly to local businesses losing out due to competition.

Supporting facts include:

- ❖ In January 2012, Chad and China disputed over a joint oil refinery venture leading to troubled economic relations between the two.²¹⁹
- ❖ Many local businesses in Chad are going bankrupt due to the low prices of Chinese products and imports.²²⁰
- ❖ Local workers and trade unions are also losing because of Chinese involvement in the economic sector.²²¹
- ❖ Increased imports of Chinese products are synonymous with job loss in Chad by locals.²²²
- ❖ Chinese companies operating out of Chad employ Chadian workers, but with long hours, unfair wages, and poor working conditions.²²³
- ❖ Chadian workers also find it difficult to communicate with their Chinese counterparts due to language barriers.²²⁴



Although likely to remain strongly negative, positive influencing factors do exist.

Chinese cooperation with Chad is favorable to consumers and investment is crucial to the development of medical, educational, and agricultural projects.²²⁵ However, the threat weighing on the Chadian businessmen will likely continue.²²⁶

Political

Positive perceptions are likely to remain strongly positive over the next three to five years

- ❖ Chadian foreign relations are motivated primarily for outside investment in Chadian industry and support by the current president Idriss Déby.²²⁷
- ❖ Khalifa Malloum, Secretary General of Bongor's regional government, spoke favorably on Chad-Chinese relations: "If the West does not want to invest in us, let the Chinese come. We welcome them. They don't tell us what to do and they bring development. They are good partners."²²⁸
- ❖ Both Chad and China are corrupt states with a history of human rights violations. The new relationship between the two will likely hinder the betterment of Chadian people.²²⁹
- ❖ Since the beginning of bilateral relations, China has implicitly backed the regime of President Idriss Déby. The World Bank, who previously invested in Chad after oil production began in 2003, eventually pulled out when Déby wanted to use oil revenues on military spending. The World Bank required Chad to spend oil revenues on human development projects, which President Déby disagreed with. China hasn't imposed the same conditions, and does not plan on doing so.²³⁰

Social

Strong negative perceptions are likely to remain strongly negative over the next three to five years. Key supporting facts include:

- ❖ China has a short history of working with Chad - since 2006 - and currently has a mostly economic relationship.²³¹
- ❖ The poverty rate in Chad rests at 55% overall, and 87% of that in rural areas, which highlights the need for a transformation of policies in the countryside. It is unlikely that China's involvement in Chad will be highly beneficial to those living in rural areas.²³²
- ❖ Chad's economy has experienced major issues including troubled economic conditions with China, environmental related problems, and the fallout coming from the Lybia conflict. This has led to the increase in the poverty rate and unemployment.²³³
- ❖ Although China provides some jobs for Chadian workers, they offer low wages and long hours. Also, the increase in Chinese involvement and project development in Chad will ultimately lead to loss of jobs and unfair working conditions.²³⁴
- ❖ As the economy continues to experience problems, it is unlikely that Chadian citizens will support Chinese involvement, especially with the effect of increased unemployment.

Analytic Notes

Analytic Confidence: Medium

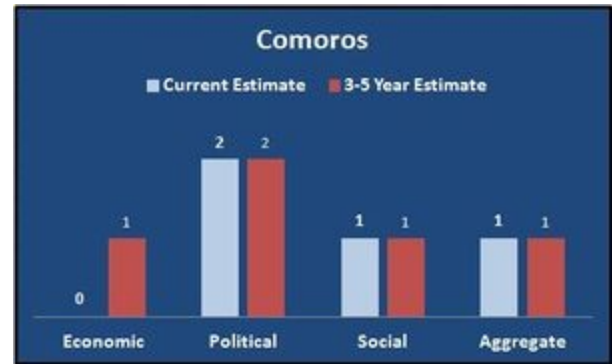
Source Reliability: Medium

Comoros

It is highly likely that over the next three to five years Comorian views of Chinese activities will remain overall strongly positive, in particular for political and social perceptions.

Economic

Based on available information, is it likely that Comorian business' primarily neutral view of Chinese activities is likely to improve and become weakly positive over the coming three to five years, particularly for the tourism and service sector.



- ❖ In a September 2012 meeting with the Chinese Ambassador to Comoros, Comorian Vice President in charge of Production, Environment, Energy, Industry, and Craft Ministries noted that "Comoros is grateful to the People's Republic of China for its invaluable and multifaceted development of the Comoros."²³⁵
- ❖ China assisted in constructing the Comorian National Tourism Office Building to help develop the Comoros tourism industry, likely to boost tourism and benefit local businesses.²³⁶ Tourism and other services account for over 50% of Comoros' GDP.²³⁷
- ❖ Comorian businesses face little competition from Chinese products as Comoros is primarily agricultural and service based.^{238 239}
- ❖ China pledged approximately USD30 million to develop Comoros' fiber optics, making communication and business transactions easier.²⁴⁰

However, trade and investment statistics still bode poorly for positive views of Chinese activities.

- ❖ Chinese FDI in Comoros is negligible compared to total FDI in Africa.²⁴¹
- ❖ A high trade deficit of nearly USD8 million, representing a nearly 100% trade deficit with China, may foster negative views toward Chinese activities.²⁴²

Political

Comorian politicians' views of Chinese activities in Comoros are highly likely to remain strongly positive over the next three to five year.

- ❖ In celebration of China's National Day in late September 2012, Comorian Vice President attended a reception at the Chinese embassy and stated that "The Union of the Comoros is grateful to the People's Republic of China for its invaluable and multifaceted development of the Comoros."^{243 244}
- ❖ Chinese aid in 2008 to Comoros has included USD13.3 million for energy projects, USD2.2 million for water treatment facilities, and USD7.7 million for education and healthcare.²⁴⁵
- ❖ The Comorian Chief of Staff met with his Chinese counterpart in 2010 and thanked China for providing Comoros with support and assistance and said Comoros will continue to adhere to the One-China policy.²⁴⁶
- ❖ At the 2011 inauguration of Comorian President Ikililou Dhoinine, the newly elected president told the Chinese special envoy that the Comoros government and people were grateful to China for its massive, selfless, and constant support.²⁴⁷

Although it remains likely that Comorian politicians will continue to view Chinese activities positively, political instability could lead to a reversal. President Ikililou Dhoinine, who views Chinese activities as largely positive, will be leaving office in 2014. It is unknown how potential successors will view Chinese in Comoros.²⁴⁸

Social

Comorian social views of Chinese activities in Comoros are likely to remain weakly positive over the next three to five year, especially for rural populations. Positive views to remain positive/improve

- ❖ China has assisted in eradicating malaria in Comoros since 2007. In April 2012, China renewed its fight against malaria by donating more anti-malaria drugs and equipment to assist Chinese doctors in Comoros.²⁴⁹
- ❖ 2010 Chinese aid included USD6.5 million for a new 100-bed hospital on the island of Anjouan and funding for three new primary schools to celebrate 35 years of relations with Comoros.²⁵⁰
- ❖ Chinese aid in 2008 to Comoros has included USD13.3 million for energy projects, USD2.2 million for water treatment facilities, and USD7.7 million for education and healthcare.²⁵¹
- ❖ Since 1982, China has provided scholarships for Comorians to study in China. In 1994, China began dispatching medical teams to Comoros and has continued in recent years.²⁵² Comorian health authorities and locals have expressed deep gratitude toward these Chinese doctors.^{253 254}
- ❖ China assisted in 2001 with establishing the national television station in Comoros.^{255 256}



Chinese doctors and medicine have eliminated malaria on the island of Mohéli. In 2012, China pledged more support to eradicate malaria on the island of Anjouan

Analytic Notes

Source Reliability: High

Analytic Confidence: Medium

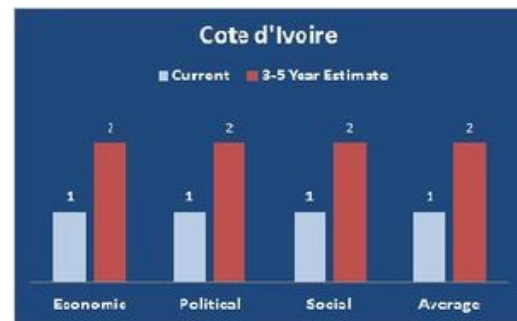
Cote d'Ivoire

It is likely that the overall perception of Cote d'Ivoire of Chinese activities will be strongly positive over the next three to five years due primarily to strong business, political and social perceptions.

Economic

Positive perceptions will likely be strongly positive in the next three to five years

- ❖ Since 1960 when Cote d'Ivoire gained independence from France, the country has been working toward improving economic growth, agricultural production, and building new infrastructure. Cote d'Ivoire is a traditional agrarian society, focused on subsistence farming, herding, fishing, and forestry. However in the past 20-30 years, the country has made a slight shift toward skilled labor and business.²⁵⁷
- ❖ As of 2011, China accounted for 5.4% of Cote d'Ivoire's imports.²⁵⁸
- ❖ Recently in August, Cote d'Ivoire officials urged Chinese investors to take advantage of the opportunities offered in the country. Cote d'Ivoire's Chamber of Commerce, Nicolas Djibo advised Chinese business men to develop stronger relations with the country's private sector.²⁵⁹
- ❖ Chinese President Hu Jintao said that China would continue to support the peaceful reconstruction of Cote d'Ivoire and encourage Chinese companies to participate in its economic development between the two countries. He also called for both countries to enhance people-to-people relations and expand cooperation in culture, education, health and human resources training.²⁶⁰



Political

Positive perceptions will likely be strongly positive in the next three to five years

- ❖ The People's Republic of China and the Republic of Cote D'Ivoire established the diplomatic relations on March 2, 1983.²⁶¹
- ❖ Chinese President Hu Jintao recently stated in a meeting between the two countries that, "Cote d'Ivoire is a major country in West Africa. China attaches high importance to relations with it and is ready to further promote bilateral ties through joint efforts," He also called on both sides to strengthen political exchanges, including those between governments, legislative bodies and ruling parties, so as to enhance political mutual trust.²⁶²
- ❖ Furthermore, Hu added that China supports the important role played by Cote d'Ivoire in promoting Africa's unity, stability and development, and will support their effort to strengthen international and regional affairs. China will continue to support the reconstruction of Cote d'Ivoire and encourage Chinese companies to aid in its economic development.²⁶³

Social

Positive perceptions will likely be strongly positive in the next three to five years

- ❖ Coffie Alain Nicaise, Ambassador of Cote d'Ivoire to China, expressed his gratitude for the support and help from China and explained that they would continue to strengthen cooperative relations with China on the basis of "peace, sincerity, friendship and solidarity."²⁶⁴
- ❖ Cote d'Ivoire faces a serious poverty problem that can only be resolved with foreign and outside assistance. The problem of housing is significant challenge for Cote d'Ivoire. Most of the people do not have decent houses to live. In most towns, there's a problem of slums which house the jobless people or those who earn little wages. Most families live in makeshift homes due to extreme poverty in the country. In an effort to resolve the problem, China has partnered with the Cote d'Ivoire government in the construction sector to try and reduce the housing shortage.²⁶⁵
- ❖ Chinese Ambassador to Cote d'Ivoire Wei Wenhua has expressed his country's willingness to help Cote d'Ivoire on the development path.²⁶⁶

Analytic Notes

Source Reliability: Medium

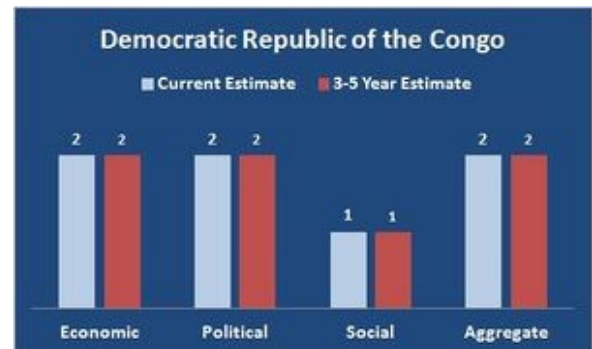
Analytic Confidence: Medium

Democratic Republic of the Congo

It is likely that businessmen, politicians, and citizens of the Democratic Republic of the Congo (DRC) will maintain an overall positive view of Chinese activities within their country.

Economic

It is likely that DRC businessmen's strongly positive views of China will remain strongly positive over the next three to five years due to strong Chinese engagement in the mining sector and benefits from trade.



- ❖ In 2007, China established the so-called “deal of the century” with DRC: Chinese investment worth USD6 billion—half for infrastructure and half for mine development—which would be repaid in copper and cobalt.²⁶⁷ Once the project is completed, revenue from mines could reach up to USD120 billion. However, the deal is far from complete and continues to go through negotiation.²⁶⁸
- ❖ The Congolese mining company Gecamines proposed the deal to revive its operations. The deal came at a time the West had failed to provide USD1.25 billion of a reconstruction plan.²⁶⁹
- ❖ The United States and Europe have stopped buying DRC minerals due to their status as “conflict minerals”, but China continues to buy them.²⁷⁰
- ❖ Trade with China is growing and DRC currently has an over USD2 billion trade surplus.²⁷¹
- ❖ Chinese Foreign Direct Investment in DRC rose drastically from 2004 to 2010.²⁷²
- ❖ China has become a huge market for illegal ivory. Up to 70% of DRC ivory is exported to China.²⁷³
- ❖ China is getting rid of tariffs on 95% of imported goods from DRC.²⁷⁴

Political

It is likely that DRC politicians' strongly positive views of China will remain strongly positive over the next three to five years as China remains the primary economic and military partner to President Joseph Kabila's isolated government.

- ❖ The United Nations, European Union, and United States have diplomatically isolated President Joseph Kamila's government by imposing sanctions on DRC. The sanctions are in response to human rights abuses.^{275 276} China, however, appears to be a willing partner and will likely be viewed positively due to their engagement in the economic sector.
- ❖ China has also militarily supported Kabila's government, which has had problems with rebel groups in the east. China has potentially given DRC USD49 million in arms since 2000.²⁷⁷ There are reports that the arms have been used on eastern rebels.²⁷⁸
- ❖ President Kabila received his military training in China.²⁷⁹
- ❖ China has sent 14 peacekeeping teams to DRC.²⁸⁰

However, several factors could influence the government's view to deteriorate

- ❖ Laurent Nkunda, former general in the DRC armed forces, believed China to be a negative influence in the country.²⁸¹
- ❖ Chinese arms to DRC sometimes fall into the hands of rebel groups to be used against the Kabila government.²⁸²

Social

It is likely that DRC citizens' current positive views of China will remain weakly positive over the next three to five years due to appreciation for China's economic investments.

- ❖ According to Claude Kabemba, director of Southern Africa Resource Watch, Congolese citizens generally appreciate the USD6 billion deal and other smaller projects the Chinese have completed. The Congolese direct their frustration with the delays of the project at the Congolese government.²⁸³
- ❖ Congolese may view China positively for "fixing" government failures. According to a Congolese man whose truck was damaged by a dilapidated road, "The road is too bad, the trucks are too expensive, and we are facing too many difficulties. It has always been this way, but now we hear that the Chinese will come and fix this."²⁸⁴
- ❖ China is constructing a USD367 million hydroelectric plant which will create 2,000 jobs.²⁸⁵

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Low

Djibouti

It is likely that the overall perception of Djibouti toward Chinese activities will be strongly positive over the next three to five years, with political and economic views remaining positive and social perceptions trending upward.

Economic

Positive perceptions will likely remain positive over the next three to five years. Supporting factors include:

- ❖ A positive perception of China in Djibouti will likely emerge with continued Chinese investment in the country. Until 2007 there was no record of Chinese FDI in the state, but since 2007 China has invested approximately USD8.6 million.²⁸⁶
- ❖ Chinese investment in Djibouti is largely in infrastructure renovation and Chinese companies are involved in rail, port, and government facilities construction and renewal.²⁸⁷

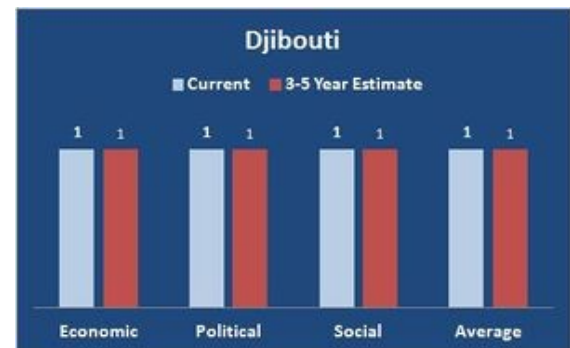
However, trade relations with other nations may affect the strength of emerging relations between China and Djibouti.

- ❖ French civil aid to Djibouti in 2008 totaled approximately USD62 million.²⁸⁸
- ❖ In 2010, the U.S. contributed USD20 million to Djibouti in economic and civil aid programs. The U.S. military presence at Camp Lemonnier and the USAID distribution center in Djibouti will complicate substantial investment by China into the country and may negatively affect the social perception of China.²⁸⁹

Political

Positive perceptions will likely remain positive over the next three to five years. Supporting facts include:

- ❖ Djibouti recognized China shortly following independence in 1977. Since this establishment in 1979, bilateral relations have made steady progress.²⁹⁰
- ❖ China recognizes the importance of the development of bilateral ties with Djibouti and is willing to increase political mutual trust, further bilateral cooperation, maintain support on issues of mutual concern and strengthen communications on important global and regional issues in order to benefit both peoples.²⁹¹
- ❖ Djibouti will strengthen ties with China to jointly contribute to international and regional peace and facilitate bilateral economic and social development. Djibouti believes China to be a true friend and is thankful for its generosity in promoting Africa's development. Djibouti's President Ismail Omar Guelleh further explained that Djibouti is ready to stand by China in the international arena through trial and tribulation.²⁹²



Social Narrative Report

The social perception of Djiboutians toward China is highly likely to progress positively over the next five years. Current social contact between Djiboutians and China is low and contributes to a moderately positive perception of China. Recent indicators of increased interest in Djibouti, Chinese investments in the economy, and recent bilateral agreements will increase positive interaction. However, Djibouti's strong economic and political ties with France and the U.S. may detract political and economic cooperation with China and negatively affect social perceptions of Chinese involvement in Djiboutian affairs.

Djiboutian social contact with China has been largely negligible until recently, though Djibouti recognized China shortly following independence in 1977.²⁹³ A positive perception of China in Djibouti will likely emerge with continued Chinese investment in the country. Until 2007 there was no record of Chinese FDI in the state, but since 2007 China has invested approximately 8.6 million USD.²⁹⁴

Chinese investment in Djibouti is largely in infrastructure renovation and Chinese companies are involved in rail, port, and government facilities construction and renewal.²⁹⁵ However, China may pivot its involvement in Djibouti to sectors that would increase cultural exchange and establish a Chinese presence in society. In July, an official visit resulted in a bilateral pledge that committed China and Djibouti to tighter economic ties, established cooperative action regarding regional security, and development of cultural exchanges.²⁹⁶ China and Djibouti announced a program to modernize Djibouti's TV and radio broadcasting with personnel training and equipment from China in August 2012.²⁹⁷ Additionally, China has agreed to reserve state funded university scholarships to Djiboutian students.²⁹⁸



Strong ties between France and its former colony along with U.S. security interests in the region may reduce the ability of China to successfully endear the population. French civil aid to Djibouti in 2008 totaled approximately 62 million USD.²⁹⁹ In 2010, the U.S. contributed 20 million USD to Djibouti in economic and civil aid programs. The U.S. military presence at Camp Lemonnier and the USAID distribution center in Djibouti³⁰⁰ will complicate substantial investment by China into the country and may negatively affect the social perception of China.

Analytic Notes

Source Reliability: Medium

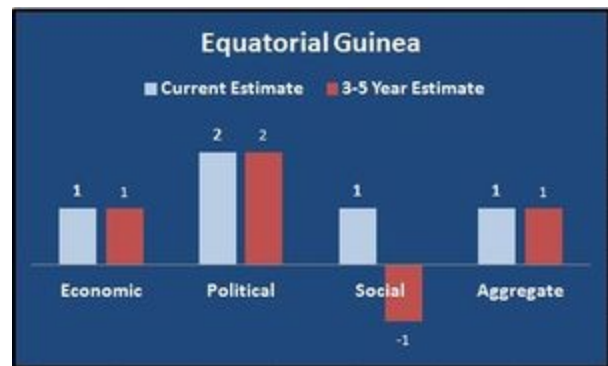
Analytic Confidence: Medium

Equatorial Guinea

It is highly likely that over the next three to five years Equatorial Guinea will maintain a weak positive overall perception of Chinese activities due to strong political sentiments and slightly positive economic sentiments.

Economic

Equatoguinean businesses' weak positive views of Chinese activities in Equatorial Guinea are likely to remain weakly positive for the next three to five years in all major economic sectors except for sporadic small businesses.



- ❖ In a 2011 interview, the Equatoguinean Ambassador to China Marcos Mba Ondo was asked about his views of Chinese businesses in Equatorial Guinea. “Chinese companies have played a crucial role in the development of Equatorial Guinea. In addition to their business interests, they also give selflessly and always place the needs and interests of the local government at the top.”³⁰¹
- ❖ Equatoguinean business elites profit from Chinese investments in oil and timber and from hiring Chinese immigrants who are generally considered harder working than locals.³⁰² Chinese investment has been increasing over the last decade by nearly USD20 million and China has played a larger role in the oil and timber industries, the two largest industries in Equatorial Guinea.^{303 304 305}
- ❖ According to Gabriel Obiang Lima, Equatorial Guinea’s Minister of Mines, Industry, and Energy, in July 2012 the Chinese Export-Import Bank agreed to provide another line of credit for electricity projects and the second phase of construction of an industrial port which will improve the country’s ability to export timber and other goods.³⁰⁶
- ❖ China purchases nearly two thirds of Equatorial Guinea’s timber exports, often doing so illegally at the benefit of large Equatoguinean timber firms.³⁰⁷ Additionally, China has become one Equatorial Guinea’s largest export destinations for oil, exporting USD1.5 billion of oil to China in 2011.^{308 309} To further increase Chinese and Equatorial Guinea oil cooperation, the two are currently in talks with Chinese firm Sinopec to construct a new refining complex.³¹⁰

However, an increasing presence of Chinese contractors has the potential to drive out local contractors and create negative perceptions.

- ❖ The Chinese Ministry of Commerce noted in 2010 that Chinese companies accounted for half of all contracted projects in Equatorial Guinea. By the end of 2010, the accumulated worth of Chinese companies in contracted projects in Equatorial Guinea hit USD4.507 billion and China’s accumulated non-financial direct investment in Equatorial Guinea amounted to USD97.64 million.³¹¹

Although the larger firms greatly benefit from Chinese activities in Equatorial Guinea, smaller firms have been negatively impacted by Chinese firms and increasing development of these firms.

- ❖ As the Chinese population increases in Equatorial Guinea, often following large Chinese firms moving into the country, the number of smaller firms competing with local Equatoguinean businesses has been increasing in recent years. One of the local merchants displaced by Chinese businesses bitterly expressed his despair: “It is so frustrating. I cannot even hit them, because, unlike us, the Chinese are extremely calm.”³¹²

Political

It is highly likely that over the next three to five years the strong positive views of Equatoguinean political elites will remain strongly positive. Supporting statements and facts include:

- ❖ President Teodoro Obiang Nguema Mbasogo met with Chinese President Hu Jintao in July 2012 and praised the achievements made in friendly cooperation. Noting it was his eighth official visit to China, Obiang said China is a good friend of Equatorial Guinea and his country cherishes the friendship with China.³¹³
- ❖ The 2012 Human Rights Watch report notes that unlike the US and other countries, China has not attached political or environmental strings to its aid. "Equatorial Guinea remains mired in corruption, poverty, and repression under President Teodoro Obiang Nguema Mbasogo, who has been in power since 1979," the Human Rights Watch said in its 2012 report. "Vast oil revenues fund lavish lifestyles for the small elite surrounding the president, while most of the population lives in poverty."^{314 315}
- ❖ In July 2010, the current First Vice President of Equatorial Guinea, then Prime Minister Ignacio Milam Tang, hailed the cooperation between China and Africa in general, and the Chinese contribution to his country's development in particular. "Equato-Guinean authorities are grateful for the Chinese support to the country's long-term socio-economic development," he added.³¹⁶
- ❖ In July 2012, the Chinese Exim Bank and Equatorial Guinea signed a preliminary agreement to supply the Chinese petro company Sinochem 11,000 barrels of oil a day in exchange for a new line of credit. Mr. Obiang said the credit would greatly help Equatorial Guinea by supplying electricity to more cities and furthering economic development.³¹⁷
- ❖ A 2010 research report by the Centre for East Asian Studies at the University of Madrid claims "The local political and economic privileged classes who have benefitted most from the growing Chinese presence in Equatorial Guinea tend to be more supportive of [Chinese activities in Equatorial Guinea], whereas a minor group of small entrepreneurs and the main opposition parties are firmly critical of China."³¹⁸

Social

Equatoguinean social perceptions on Chinese activities in Equatorial Guinea are likely to decrease and become weakly negative in the next three to five years, primarily due to high unemployment associated with increasing Chinese firms in the country and environmental damage caused by Chinese firms.

- ❖ A local Equatoguinean bitterly expressed his despair toward the Chinese: "It is so frustrating. I cannot even hit them, because, unlike us, the Chinese are extremely calm."³¹⁹
- ❖ Chinese firms in Equatorial Guinea bring an estimated 85-95% of their labor from China, employing minimal Equatoguineans. This number is high even compared to Chinese firms in other Sub-Saharan African countries.^{320 321} Unemployment stands at an estimated 22% in Equatorial Guinea.³²²
- ❖ When Chinese firms do hire locals, the work conditions are generally very poor. Equatoguinean workers at a Chinese oil company noted that the Chinese and African cultures share a disregard for human rights and therefore working conditions offered by Chinese companies are far worse than Western companies.^{323 324}

- ❖ Chinese firms, particularly in the timber and oil sectors, have been accused of causing environmental damage.^{325 326}
- ❖ In 2008, two Chinese workers were killed in labor related strikes at a Chinese firm in Equatorial Guinea.³²⁷
- ❖ Large Chinese firms, bringing in an estimated 5,000 Chinese nationals, have created the second largest minority in Equatorial Guinea and have much more interaction with locals than their Western counterparts. These large firms also create smaller spin off businesses run by Chinese nationals providing services to other Chinese in the country.^{328 329}
- ❖ In 2006, a USD2 billion loan from Chinese Exim Bank was given to Equatorial Guinea with stipulations that the loan be used to buy Chinese products and services from Chinese corporations, providing little to no benefit for local Equatoguineans.³³⁰

Although the trend is overwhelmingly negative, some positive sentiments remain.

- ❖ Cheap consumer goods have increased Equatoguineans' access to many new types of goods.^{331 332}
- ❖ New Chinese businesses are providing new services, such as Internet access and healthcare, to many local Equatoguineans.³³³

Analytic Notes

Source Reliability: Medium

Analytic Confidence: High

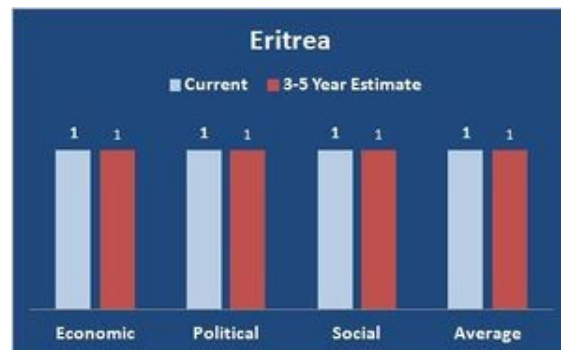
Eritrea

It is likely that the overall perception of Eritrea toward Chinese activities will be strongly positive over the next three to five years, due mainly to positive political, social, and economic perceptions throughout the country.

Economic

Positive perceptions will likely remain positive over the next three to five years. Supporting facts include:

- ❖ China is playing a key role in Eritrea's socio-economic development through the supply of aid, capital, machinery, technology, knowledge, and skills. Chinese enterprises have also been involved in the rebuilding of vital infrastructure such as roads, airports, power and telecommunications, schools, and hospitals.³³⁴
- ❖ In 2010, President Isaias Afewerki stated, "Eritrea can be a gateway for investment in Africa if we can take advantage of our excellent strategic location. Our partnership with China, even though it is in its early stages, will dramatically change the reality in this country and give us a greater global interaction."³³⁵
- ❖ He went on to say, "We are developing our agricultural infrastructure and, in partnership with China, are developing a textile industry. The initial commitment with China for cotton exports is already in place. We have begun with very modest programs but we need to expand them."³³⁶



Political

Positive perceptions will likely remain positive over the next three to five years. Supporting facts include:

- ❖ Eritrea and China established diplomatic relations in 1993.³³⁷
- ❖ The Eritrean government has urged Chinese companies to make Eritrea a trading and transportation center for Chinese goods.³³⁸
- ❖ In order to capitalize on these commercial opportunities, Eritrea is building a series of modern free trade zones. Chinese enterprises are among the foreign firms that will be based there and benefit from a tax-free environment in which no direct or indirect taxes are paid on sales or profits.³³⁹

Social

Positive perceptions will likely remain positive over the next three to five years. Supporting facts include:

- ❖ In 1994, China and Eritrea signed a cultural agreement. This agreement stated that China would send experts to Eritrea to further education and improve teaching across the country.³⁴⁰
- ❖ President Afewerki explained that the revenue generated from China would be allocated for development of other investment sectors that will definitely improve the living standard of Eritrean citizens. Furthermore, the president went on to say that China is responsible for reducing famine and hunger in the country.³⁴¹ It is likely that this impact has resulted in positive social perceptions of Chinese activities.

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

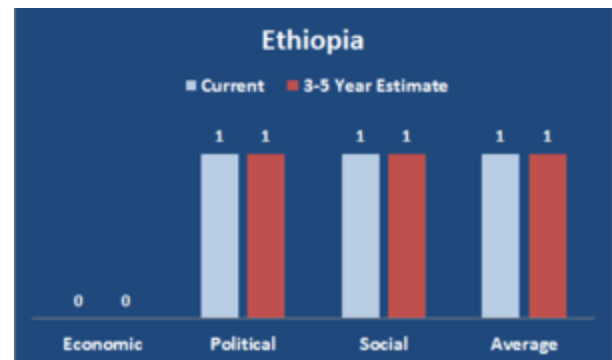
Ethiopia

Positive perceptions of Chinese activity in Ethiopia among the political elite and population are likely to improve over the next three to five years with a weak positive trend while divided business perceptions remain stagnant.

Economic

Ethiopian business perceptions of Chinese activity in the country are divided and likely to remain so over the next three to five years.

- ❖ Unlike other SSA countries, there has not been an influx of Chinese retail businesses and small scale manufacturers, preserving local market competition,³⁴² positively affecting small business perceptions of China.
- ❖ The opening of the Ethiopian-Eastern Industrial Zone has encouraged Chinese investment in manufacturing and the creation of joint ventures with Ethiopian business.³⁴³
- ❖ Ethiopian businesses which are engaged in ventures with Chinese companies report positive spillovers including knowledge transfer.³⁴⁴
- ❖ 63% of Ethiopian business perceives benefits from engaging in trade with China and note the influx of inexpensive inputs from China for local manufacturing.³⁴⁵



However, further penetration of the Ethiopian market will negatively affect business perceptions of Chinese activities in the country

- ❖ 96% of Chinese businesses engaged in Ethiopia in 2009 reported that Ethiopia was their target market, increasing competition with local firms.³⁴⁶
- ❖ 66% of Ethiopian businesses concurrently reported being concerned that Chinese imports into Ethiopia and the East Africa region could negatively impact their export market share; 40% of Ethiopian businesses were concerned with increased competition on the domestic market from Chinese producers.³⁴⁷
- ❖ In the construction industry, domestic firms have pressed for government protection while the administration prefers to create preferential relations with China.^{348 349}
- ❖ The nine largest Chinese companies in the Ethiopian East Industrial Zone are involved in construction, increasing competition with domestic firms.³⁵⁰

Political

The positive perceptions of Chinese activities in Ethiopia among political elites are highly likely to remain and indeed grow over the next three to five years due to successful management of Ethio-Chinese relations.

- ❖ Regarding technology transfer, Ethiopia pursued the creation of the Ethio-China Polytechnic University to encourage knowledge development domestically.³⁵¹
- ❖ The government monitors Chinese enterprise development and reserves local retail and small scale manufacturing for domestic producers, reducing competition from China domestically.³⁵²
- ❖ China is Ethiopia's second largest donor after the UK in aid distribution and the first for aid commitment.³⁵³

- ❖ 94% of Chinese aid to Ethiopia is concentrated in energy development and transportation/infrastructure.³⁵⁴
- ❖ China granted Ethiopia USD18.5 million in debt relief.³⁵⁵
- ❖ The Ethiopian government created the Ethiopian East Industrial Zone specifically to attract Chinese manufacturing to the region for domestic consumption and export to Africa, the Middle East, and Europe.³⁵⁶

However, market disruptions and economic competition for local producers may negatively affect political elites' perception of Chinese activity in Ethiopia.

- ❖ The continued domination of major construction and development projects by Chinese construction companies, though supported by the government,³⁵⁷ may prompt business to increase lobbying pressure for protection.
- ❖ The “turn key syndrome” of Chinese aid projects in SSA that promotes Chinese dominance in all aspects of development, including the employment of imported Chinese workers, negatively impacts natural domestic development and may negatively affect Ethiopia's willingness to accept Chinese aid.³⁵⁸

Social

Ethiopian perceptions of Chinese involvement in Ethiopia are positive and likely to improve over the next three to five years.

- ❖ 67% of the population perceive Chinese involvement in Ethiopia very positively or somewhat positively (2007)³⁵⁹ and 63% of Ethiopians perceive Chinese investments in the domestic economy is beneficial to Ethiopia (2009).³⁶⁰
- ❖ Regarding the future, 85% of the populace perceives Chinese influence in Ethiopia is growing (2007).³⁶¹
- ❖ Among aid donors to Ethiopia, China ranks first for aid and development commitments and second in aid dispersal after the UK.³⁶²
- ❖ Ethiopia received USD18.5 million in debt relief from China, positively impacting the country's perception in Ethiopia.³⁶³
- ❖ China financed and built a 100 bed hospital that opened in 2012 and provided medical equipment in Dukem.^{364 365}
- ❖ The Ethiopian government maintains control over immigration and business activities by Chinese in the country, reducing the number of small enterprises run by the Chinese and reducing competition among small scale manufacturers and retailers.³⁶⁶
- ❖ Despite media coverage stating otherwise, the Chinese have not been largely absent from the land grab for industrial agricultural enterprises in rural Ethiopia.³⁶⁷

However, the following may negatively impact the Ethiopian perceptions of Chinese activity in the country.

- ❖ Chinese aid projects are largely described as “turn-key” projects with financing and funding, equipment, labor, management etc. coming from China.³⁶⁸ The continuation of such policies may negatively impact technology transfer to Ethiopians, employment, and construction industry development domestically.³⁶⁹
- ❖ Consumers perceive Chinese consumer goods are of inferior quality (77% of respondents), however 66% believe the price is fair for the quality.³⁷⁰

Analytic Notes

Source Confidence: Medium

Analytic Confidence: High

Gabon

It is likely that overall Gabonese views of China will improve over the next three to five years, primarily among businessmen and politicians. However, the popular view of China will likely remain weakly negative.

Economic

It is likely that overall Gabonese business opinion of Chinese activities will remain weak positive over the next three to five years due to high levels of investment. However, this view of China is divided among the mining, oil, and forestry industries.

Gabonese in the mining sector view China negatively and will likely maintain that view.

- ❖ In 2006, the state-owned China National Machinery Import and Export Corporation made a deal with Gabon to explore its untapped Belinga iron ore reserves. The mine contains up to one billion tons of iron ore, one of the largest untapped deposits in the world.³⁷¹
- ❖ There have been repeated delays and complaints with the project, and Gabon is currently going through renegotiation with the company. It is likely that Gabon will drop China from the project and pursue a deal with Australia.³⁷²

Gabonese in the oil sector view China neutrally and will likely maintain that view

- ❖ Despite oil block purchases³⁷³ and exploration deals,³⁷⁴ Chinese involvement in the oil sector remains limited and most Gabonese officials and company representatives believe China is unlikely to gain a larger influence.³⁷⁵

Gabonese in the forestry sector view China positively and will likely maintain that view

- ❖ Gabon is one of the top five timber producing countries for China. China's demand for wood increased Gabonese output and diversified the types of trees exported.³⁷⁶

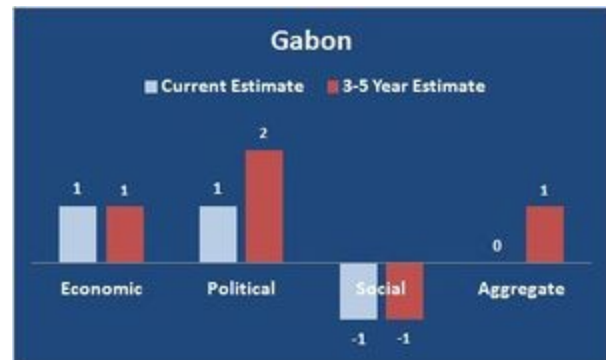
Gabonese businessmen overall will likely maintain a positive view of China over the next three to five years due to huge investment

- ❖ Gabon has made plans to invest USD14.1 billion in infrastructure projects. The government is open to foreign investment, and with China a likely partner, businessmen will increasingly view Chinese activities as positive.³⁷⁷
- ❖ Chinese loans to Gabon have been increasing steadily since 2000.³⁷⁸
- ❖ Gabon has a USD300 million trade surplus with China.³⁷⁹

Political

Gabonese politicians' view of China is weakly positive and is likely to improve to strongly positive over the next three to five years due to frequent official visits and pledges to improve ties.

- ❖ Gabon and China have been making high level visits since 1974.³⁸⁰
- ❖ Chinese delegations visited Gabon in February 2011³⁸¹ and October 2011³⁸² and most recently on 23 October 2012 a high official in the Chinese Communist Party visited Gabon and pledged to strengthen ties.³⁸³
- ❖ President Ali Bongo Ondimba is open to working with partners that want to work closely with Gabon to meet national goals.³⁸⁴



However, political relations could also be affected by the future of the Belinga project

- ❖ Gabon has a joint committee in parliament in charge of relations with China.³⁸⁵ Chinese projects are reviewed and constantly monitored by the committee.³⁸⁶
- ❖ The Gabonese government is reportedly frustrated with the slow progress of the Chinese in mining deposits in the Belinga iron reserves.³⁸⁷

Social

It is likely that Gabonese citizens' slightly negative view of China will remain unchanged over the next three to five years due to several issues.

- ❖ The Belinga project has received criticism from environmental activists and labor groups.^{388 389}
- ❖ Gabonese labor unions have tried to enact laws that would limit the percentage of foreign workers in Gabon to 10 percent, but China is forced to import skilled laborers to complete its projects.³⁹⁰
- ❖ A Gabonese union called for 2,000 foreigners illegally working in the country to be deported.³⁹¹
- ❖ In 2008, Gabon banned the sale of Chinese milk products after 4 Chinese children died from consuming dairy.³⁹²

However, there are several points that could encourage a positive view of China

- ❖ Jean Ping, a Gabonese of Chinese descent, has had a very successful role in Gabonese politics since 1978.³⁹³
- ❖ The Belinga project, when completed, would provide 26,000 jobs.³⁹⁴
- ❖ Chinese constructed Gabon's Friendship Stadium, the Grand Poubara dam, and roads in southern Gabon.³⁹⁵

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

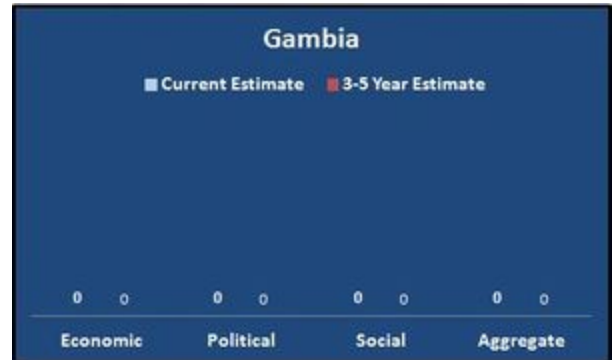
Gambia

It is likely that Gambian perceptions of Chinese activities will continue to be neutral in the next three to five years, primarily due to minimal interaction between China and The Gambia.

Economic

Gambian business views of Chinese activities in Gambia are likely to remain neutral over the next three to five years. Key facts include:

- ❖ Gambia severed ties 15 years ago. As such there is little to no interaction with Chinese activities in Gambia since 1995 and have created few positive or negative attitudes of Gambian businesses toward China.
- ❖ Since cutting relations with mainland China, Taiwan has adequately provided funding and support lost from China.³⁹⁶ This relationship with Taiwan has neither hurt nor strengthened Gambian views of China.



However, factors that could cause perceptions to increase or decrease include the following. Although there are currently no identifiable Chinese activities in Gambia aside from trade, Gambia previously had a long history of business ties with and assistance from mainland China.³⁹⁷

- ❖ Gambia currently trades substantially more with China than Taiwan, possibly creating strong positive views of China as a potential market.^{398 399}
- ❖ Gambia has a large trade deficit with China, approximately USD45 million, or a 54% deficit, that has potential to foster negative views of Chinese activities in Gambia.⁴⁰⁰

Political

Because of a lack of diplomatic relations and interactions, it remains likely that Gambian politicians will retain a neutral view of Chinese activities for the next three to five years.

- ❖ For 15 years, Gambia has retained diplomatic ties with Taiwan over China.⁴⁰¹
- ❖ In October 2012, Gambian Foreign Minister Momodou Tangara met with the Taiwanese ambassador to Gambia and noted that “cooperation between Taiwan and The Gambia could only be described as excellent and beneficial.”⁴⁰²
- ❖ Gambian President Jammeh, making his ninth trip to Taiwan in July 2012, called Taiwan “one of the best friends Gambia has ever had.”⁴⁰³

Social

Due to a lack of interaction between Gambia and China, it is likely that local Gambian views of Chinese activities will remain neutral over the next three to five years. No reported FDI, aid, or Chinese immigrants within Gambia all suggest a continued neutral view.

- ❖ However, as trade continues to increase, it remains possible that views may lean either positive or negative, depending on the nature and equality of trade. Currently, it appears to be trending positively for Gambia.⁴⁰⁴

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Low

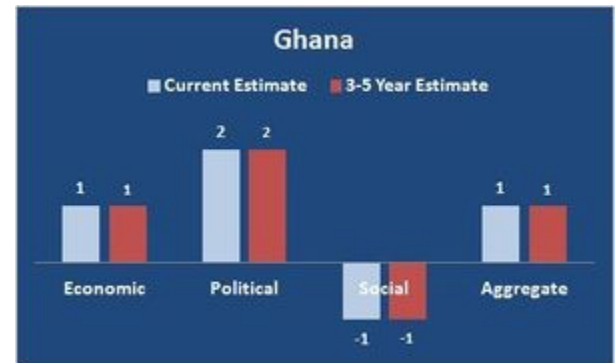
Ghana

It is likely that the overall view of Ghanaians toward Chinese activities in their country will remain weakly positive over the next three to five years. Ghanaian businessmen and politicians will view China positively while Ghanaian citizens will view China negatively.

Economic

Ghanaian businessmen in the infrastructure sector will likely have an increasingly positive view of China over the next three to five years due to large Chinese investment.

- ❖ In September 2010, China loaned Ghana USD16 billion for infrastructure, water, and technology projects which will be paid for by exports.⁴⁰⁵
- ❖ Ghana is using a USD3 billion loan from China to build ports and power plants.⁴⁰⁶
- ❖ China is constructing a USD60.5 million road that will connect northern and southern parts of Ghana.⁴⁰⁷
- ❖ Through the first three quarters of 2012, China has registered 40 projects in Ghana, more than any other country.⁴⁰⁸



Ghanaian businessmen in other sectors of the economy, especially in manufacturing, importing, and exporting, have a mixed view of China which will likely trend negatively over the next three to five years due to cheap Chinese products competing with Ghanaian manufacturers.

- ❖ Trade with China has increased drastically over the past couple years, though there is an over USD2 billion trade deficit.⁴⁰⁹ Ghana imports stationary, textiles, toiletries, plastic wares, and other assorted items from China.⁴¹⁰
- ❖ Ghana is looking to fund the deficit and the USD3 billion loan with newly discovered oil. The minority in government has called this unfair and detrimental to Ghana.^{411 412}
- ❖ Ghanaian manufacturing industries may suffer as cheap Chinese goods continually flood the market due to the trade deficit.⁴¹³
- ❖ Smuggling of pirated textiles from China has essentially destroyed the textile industry. The numbers of textile firms has decreased from 40 two decades ago to 4 today.⁴¹⁴
- ❖ Efforts are being made to move Ghana away from exporting resources to producing more goods. Main opposition leader Akufo-Addo wants to steer Ghana away from being simply a resource producing country.⁴¹⁵ Ghanaian manufacturers and service providers supported Made-In-Ghana goods at the Made-In Ghana Expo (MIGHA 2012).⁴¹⁶

There are several other positive points that contribute to business' overall positive view of China.

- ❖ Chinese Foreign Direct Investment in Ghana has risen from less than USD1 million in 2006 to nearly USD56 million in 2011.⁴¹⁷
- ❖ China has transferred technology to smaller Ghanaian firms.⁴¹⁸ Some Ghanaians partner with Chinese in gold mining to receive mining equipment.⁴¹⁹
- ❖ It is expected that more Chinese investment, especially in the manufacturing sector, will increase employment.⁴²⁰

Political

Ghanaian politicians' strong positive view of China is likely to remain strong positive over the next three to five years due to perceived benefits from economic investment, military support, and political party support.

- ❖ Ghana and China have historically enjoyed positive political relations. Ghana supported the legitimacy of the PRC in the United Nations and to this day supports the One-China policy. Ghana supported China during its 1962 war with India and during the Tiananmen Square protests.⁴²¹
- ❖ High Ghanaian officials hold China in high regard.
 - ❖ Late President John Atta Mills visited China in September 2010 to strengthen bilateral ties.⁴²²
 - ❖ In his reelection campaigning, current president John Dramani Mahama has touted his achievements to secure Chinese investment.⁴²³ Mahama stated that Chinese investment is highly appreciated since Western assistance is unreliable after the financial crisis.⁴²⁴ Mahama thanked the Chinese for building a stadium and a marketplace in memory of President Mills.⁴²⁵
 - ❖ Main opposition leader Nana Akufo-Addo told the BBC that Chinese investment in Ghana is "very welcome," though he appears open to investment from other countries as well.⁴²⁶
- ❖ China has supported Ghana's military by building two new aircraft hangars⁴²⁷ and by transferring USD78 million in arms from 2000 to 2011.⁴²⁸
- ❖ Ghanaian political parties have received funding from Chinese sources
 - ❖ Huawei, a Chinese telecommunications company, has reportedly bribed the ruling National Democratic Congress party by producing campaign paraphernalia in return for a USD43 million tax exemption.⁴²⁹
 - ❖ The National Patriotic Party has a Chinese branch which recently donated \$32,500.⁴³⁰

However, Ghanaian media coverage of political scandals involving the Chinese could force the government to reassess its relationship with China

- ❖ The Huawei scandal received negative press in Ghanaian and African media.^{431 432 433}
- ❖ Ghana's National Security Coordinator was accused of being flown to China in exchange for awarding a Chinese company a contract and tax exemption.⁴³⁴
- ❖ The Centre for Public Interest Law accused President Mahama of unconstitutionally acquiring a USD3 billion loan from China, but the Ghanaian Supreme Court ruled he had acted properly.⁴³⁵

Social

Ghanaian citizens' weak negative view of China is likely to remain weak negative over the next three to five years mainly due to illegal Chinese immigration.

- ❖ Ghana has had problems with illegal Chinese miners working in the gold industry. On 11 October 2012, Ghanaian police killed a 16-year-old Chinese boy in a raid and detained 101 Chinese suspected of illegal gold mining.⁴³⁶ In September 2012, Ghanaian officials deported 30 Chinese miners.⁴³⁷
- ❖ The problems in the gold sector have prompted Ghanaian newspaper Daily Guide⁴³⁸ and Minister of Foreign Affairs Alhaji Mumuni⁴³⁹ to call for a review of the number of Chinese entering the country.
- ❖ In some cases, Chinese mining activity has damaged the environment and crop fields. Local Ghanaians and Chinese miners have gotten close to violent scuffles.⁴⁴⁰

- ❖ There was negative media coverage of Chinese digging graves at the presidential palace, apparently for recently deceased President Mills.^{441 442}
- ❖ The percentage of Ghanaians holding a positive view of Chinese influence in the world decreased by 8 points from 2011 to 2012.⁴⁴³
- ❖ Employment in the textile industry is down from 25,000 to 4,000 due to cheap and counterfeit Chinese textiles.⁴⁴⁴

Despite evidence suggesting that the Ghanaian people will continue to view China negatively, according to a personal interview with a Ghanaian student, Ghanaians view Chinese people as “super-smart” and highly respect their work ethic. The student spoke further, “[Africans] see [Chinese] as very serious and principled people. Also, ...Ghanaians find them very approachable and easy to talk to. If a Ghanaian sees an American and a Chinese at opposite ends of a room, chances are the Ghanaian will go and talk to the Chinese.” [sic]

Analytic Notes

Source Reliability: Low

Analytic Confidence: Medium

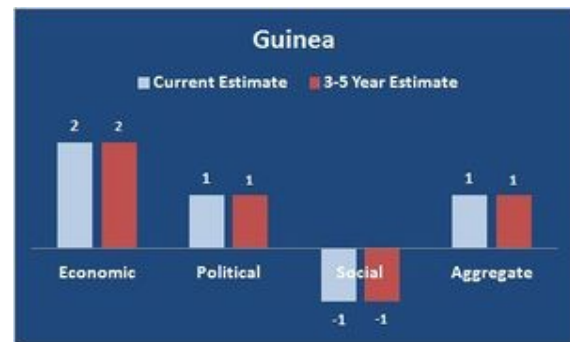
Guinea

It is likely that Guinean businessmen and politicians will maintain a positive view of China over the next three to five years. However, Guinean citizens will continue to view China weakly negative.

Economic

It is likely that Guinean businessmen will continue to view China strongly positive over the next three to five years due to the commencement of mining activities at Guinea's first iron ore mine.

- ❖ On 11 June 2012, operations launched at Guinea's first iron ore mine, Simandou, which is jointly owned by the Guinean government and China International Fund.⁴⁴⁵
- ❖ China Power Investment is financing a USD5.8 billion deal with Guinea to construct a bauxite mine, alumina refinery, coal power plant, and deep water port in exchange for digging rights in the nation's iron ore.^{446 447}
- ❖ Despite enacting a new mining code in September 2011 and subsequently cancelling deals with China made under the previous administration, Guinean President Alpha Conde is reportedly confident that the USD5.8 billion deal will come through.⁴⁴⁸
- ❖ Chinese Ambassador Mamadi Diare is preparing to lobby China for part of a USD20 billion pledge to Africa to develop the Makona River Free Zone Project, which will "achieve maximum socio-economic development in the Makona River area and...develop industrial, urban infrastructure, commodities trade, commerce, services, and real estate and properties within the Free Zone area."⁴⁴⁹
- ❖ A Guinean businessman commented on the benefit of buying cheap Chinese products and reselling them in Guinea for a profit.⁴⁵⁰



However, there are several points that could influence a negative view of China.

- ❖ In October 2012, Vale, a Brazilian mining company, put its operations in the Simandou mines on hold due to a drop in iron ore prices. Some attribute the drop in prices to weakening Chinese demand.^{451 452} Guineans could contribute a loss of business to the Chinese.
- ❖ Chinese FDI in Guinea has not changed significantly since 2004, although overall FDI in Africa has increased sevenfold.⁴⁵³
- ❖ Guinea has a USD600 million trade deficit with China.⁴⁵⁴

Political

It is likely that the Guinean government will continue to view China weakly positive over the next three to five years due to Chinese investment in the mining sector.

- ❖ According to President Conde, "Guinea has abundant mining resources and China is a rapidly developing nation in great need of commodities and resources. We will open the door widely to Chinese companies and provide what China needs. It's a sort of win-win cooperation."⁴⁵⁵
- ❖ President Conde met with Chinese Premier Wen Jiabao at the 2011 Summer Davos in Dalian and expressed hope that China could participate positively in the exploitation of Guinea's natural resources.⁴⁵⁶
- ❖ President Conde affirmed his country's commitment to the One-China Policy.⁴⁵⁷

However, it is clear that Guinean politicians do not want to become dependent on a single country for their country's development.

- ❖ According to Mines Minister Mohamed Lamine Fofana, Guinea will not favor Chinese companies over any other trying to gain a stake in its mining sector, saying, “[China International Fund] will be treated like any other company,” and “this company will be subject to the same mining laws as every other mining company working in the country”.⁴⁵⁸
- ❖ Chinese tycoons are attempting to bid for an iron ore project that has already been given to Rio Tinto, a British-Australian firm.⁴⁵⁹ As the Chinese try to gain more influence in Guinea's mining sector, politicians could begin to view China negatively.

Social

It is likely that Guinean citizens will continue to view China weakly negative over the next three to five years due to employment issues.

- ❖ Chinese firms are widely perceived as frequently excluding or neglecting local workers.⁴⁶⁰
- ❖ In a round table discussion on the impact of the USD5.8 billion deal, a citizen expressed his concerns with employment terms, environmental protection, and community development.⁴⁶¹
- ❖ Guinean mine workers are reportedly frustrated with the government to provide acceptable working conditions. In January 2012, one Guinean was killed during riots over a power failure.⁴⁶²
- ❖ A Chinese timber company was accused of negligently clearing the rainforest without regard to the environment.⁴⁶³

Despite this negative view, China continues to invest in development projects, which could foster a positive view.

- ❖ China is constructing a 385 kilometer road, a new international airport, and a 5-star hotel.⁴⁶⁴
- ❖ In February 2011, China signed two agreements worth USD26 million to reportedly build a hydroelectric and thermal power plant.⁴⁶⁵
- ❖ China donated 100 buses, 500 tricycles, 50 harvesters, and 22 generators which, according to Electricite de Guinee Coordinator Abdoulaye Keita, will give power to 15 prefectures and sub-prefectures.⁴⁶⁶

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Guinea-Bissau

Guinea-Bissau is highly likely to have positive perceptions of Chinese activities in all three sub-groupings for the next three to five years.

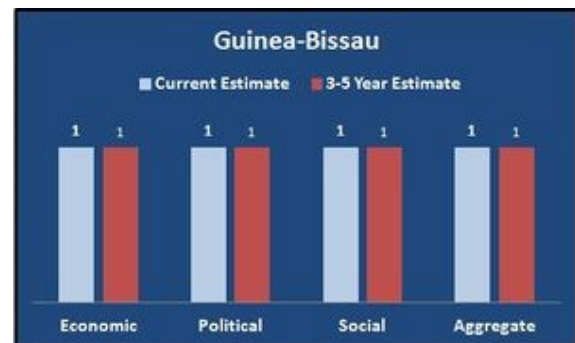
Economic

The weak positive opinion of Guinea-Bissau businesses toward Chinese activities is likely to remain weakly positive over the next three to five years, for agricultural, service, and manufacturing sectors and small and large businesses.

- ❖ China has removed tariffs on 442 products from Guinea-Bissau, primarily on agriculture products.^{467 468}
- ❖ Fishing agreements dating back to 1984 require Chinese companies to reinvest in local industries, hire locals, and sell products locally.⁴⁶⁹
- ❖ Chinese engineers have helped develop new rice paddy fields with new strains of rice seeds that produce an output up to three times as high as normal.⁴⁷⁰
- ❖ China has funded construction projects to rebuild the parliament building and presidential palace.⁴⁷¹
- ❖ Geocapital, a Chinese-Macau investment firm, and local Guinean-Bissau partners have purchased a 60% share of Banco da Africa Ocidental (BAO), Guinea-Bissau's major bank, which promises to provide greater access to lending to local businesses.^{472 473 474}
- ❖ Private Chinese investors, such as casino tycoon Stanley Ho, have invested in a casino and the tourism industry in Guinea-Bissau.^{475 476}
- ❖ China announced in late July 2012 that ZTE Corporation will assist in funding and manufacturing wind turbines and solar cells on all inhabited islands of Guinea-Bissau.⁴⁷⁷

However, certain trade and investment factors could indicate a change in sentiment, leading to a negative view of Chinese activities by Guinean-Bissau businesses.

- ❖ A trade deficit of approximately 72% with China and low FDI figures suggest a potential for increasing negative views.^{478 479}



Political

Building on over a decade of strong positive views of Chinese activities by Guinea-Bissau politicians, it is likely that Guinea-Bissau politicians continue to view Chinese activities weakly positively over three to five years.

- ❖ Although the military coup has overthrown the largely Chinese friendly government in Bissau, leaders and politicians are unlikely to risk perceived benefits from China.
- ❖ Following Guinea-Bissau's civil war, China has provided funding for the military, including rehabilitating the main military hospital, construction of a residential area for officers, and repairs for military installations damaged during the war.⁴⁸⁰ There are also unconfirmed reports that Guinea-Bissau officers planned to train with the PRC, although it is widely known that China trained the 2009 assassinated president João Bernardo Vieira in guerrilla warfare during Guinea-Bissau's fight for independence.^{481 482}
- ❖ Additional Chinese gifts over the last five years include diplomatic vehicles and equipment for the Bissau embassy in Beijing, over 30,000 tons of rice donations, and medical equipment and expertise.⁴⁸³

- ❖ In 2007, China also donated USD4 million to Guinea-Bissau to pay salaries of civil servants.⁴⁸⁴

However, with the recent coup, the level of confidence remains low due to the uncertainty of the ongoing situation.

Social

During the next three to five years, it is likely that Guinean-Bissau views of Chinese activities in Guinea-Bissau remain weakly positive for elite, rural, and urban sub-groups. Key supporting facts include

- ❖ China has donated over 30,000 tons of rice which have greatly helped in stabilizing local markets and curbing social unrest.⁴⁸⁵
- ❖ In 2007, China allocated funds for refurbishing schools, health facilities, and housing for locals and veterans in Guinea-Bissau.^{486 487}
- ❖ In 2011, a team of Chinese engineers began assisting locals with rebuilding the national stadium destroyed in the civil war.⁴⁸⁸
- ❖ Since 1977, China has provided yearly scholarships for Guineans to study in China, offering approximately a half dozen every year with over 100 since 1977.^{489 490}
- ❖ Fishing agreements with China, which require reinvestment, hiring of locals, and sales to the local Guinea-Bissau communities, have aided many Guinea-Bissauans.⁴⁹¹

Although generally positive in their views of China, trade relations and a large trade deficit could have a negative impact on Guinean-Bissau views of Chinese activities.

- ❖ A high trade imbalance with China is shown to negatively impact local views of China.⁴⁹² Guinea-Bissau has a trade deficit of approximately USD10 million, or 72% of its trade with China.^{493 494}
- ❖ Low Chinese FDI has been shown to correlate with a low opinion of Chinese. Currently, there is no reported Chinese FDI in Guinea-Bissau.⁴⁹⁵

Analytic Notes

Source Reliability: High

Analytic Confidence: Medium (low for political)

Kenya

It is highly likely that positive perceptions of Chinese activities in Kenya among the political elite and population will improve with a weak upward trend over the next three to five years. Over the same time period, negative perceptions among the business community are likely to decline.

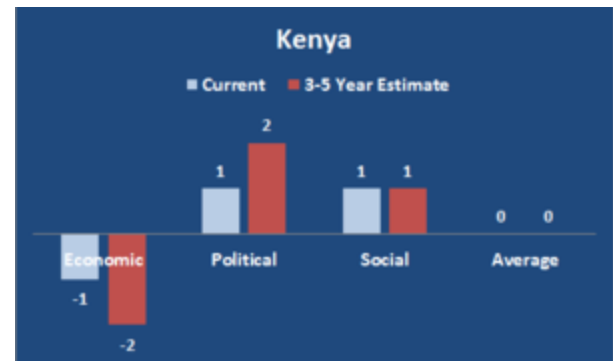
Economic

Business perceptions of Chinese activity in Kenya are negative and highly likely to continue to decline over the next three to five years due to competition from Chinese firms for development contracts and competition on domestic and export markets.

- ❖ The majority of exports to China are raw materials with little or no value added, negatively impacting second tier industries in Kenya.⁴⁹⁶
- ❖ Chinese funding of major infrastructure projects in Kenya stipulate that Chinese construction companies be contracted.⁴⁹⁷
- ❖ Chinese loan for USD72 million to construct National Fiber Optic Backbone Infrastructure Project will be contracted to Huawei telecommunications firm.^{498 499}
- ❖ USD2.6 billion railway project linking Nairobi and Mombasa will contract Chinese construction companies and will be built to Chinese rail standards.⁵⁰⁰
- ❖ Kenyan Airports Authority has signed a USD546 million deal to have Chinese contractors build a new airport terminal.⁵⁰¹
- ❖ Thika Super Highway and Mam Lucy Hospital built by Chinese companies and partially funded by Chinese loans.⁵⁰²
- ❖ Kenyan construction contractors have lobbied the government for protectionist policies to save domestic development companies.⁵⁰³
- ❖ Overall, Kenya has a -98% trade balance with China.⁵⁰⁴
- ❖ Kenyan domestic markets and major export markets in East Africa have been flooded in the last decade by Chinese imports and are increasingly losing market share.⁵⁰⁵
- ❖ Domestic retail businesses have additionally reported negative impacts due to an influx of small scale Chinese retailers.⁵⁰⁶

However, the following may positively impact business perceptions of Chinese activities in Kenya.

- ❖ Future government protection of domestic construction companies.⁵⁰⁷
- ❖ Kenyan enforcement of visa requirements and taxing for Chinese traders and retailers.⁵⁰⁸
- ❖ Government enforcement of counterfeit laws to discourage Chinese importation of domestically produced brands and protect local brand image.⁵⁰⁹



Political Narrative Report

It is likely that Kenyan politicians' perception of China will grow more positive over the next five years. This is mainly due to China's ability and willingness to develop Kenya's infrastructure and help the Kenyan government meet other goals. Kenyan politicians have traveled to China to gain support for these projects and have in turn supported Chinese policy on Taiwan and Tibet. Trends that could negatively affect the government's view of China include Chinese negligence to support the African Union Mission to Somalia (AMISOM), Chinese withdrawal after possible post-election violence, and funding of infrastructure projects.

Over the next five years, it is likely that the Kenyan government's view of China will grow even more positive from the already positive view that stands today. Kenya and China share a strong political relationship. The Chinese embassy in Nairobi is one of China's largest in terms of size and employees. Since 1980, Kenyan and Chinese officials, including the current Kenyan president, vice president, and prime minister, have made over 40 official visits between the two countries.⁵¹⁰ Both countries vote together roughly 80% of the time on United Nations General Assembly resolutions and Kenya supports the One-China policy.⁵¹¹

Kenyan politicians have turned to China for funding and construction of much needed infrastructure projects. At the request of Prime Minister Raila Odinga, China financed \$72 million for the National Optic Fibre Backbone Infrastructure, designed to deliver internet access to most Kenyans.⁵¹² This project is one of two that the Kenyan government has only allowed Chinese companies to bid on.⁵¹³ The Chinese are funding a \$2.6 billion railway that will connect Uganda and inner Kenya to the port city of Mombasa.⁵¹⁴ The Chinese state-owned corporation Sinohydro is constructing the \$320 million Thika superhighway.⁵¹⁵ President Mwai Kibaki has called on China to invest in the \$27.5 billion LAPSET infrastructure project.⁵¹⁶ Health care trade between China and Kenya has increased from \$190 million in 2001 to \$1.84 billion in 2011.⁵¹⁷ The government is increasingly turning to China for construction projects as Kenyan firms are too inexperienced to handle the size of the projects and European firms are too expensive.⁵¹⁸

The Kenyan government has also turned to China for its environmental concerns, and China appears to be willing to help. Vice President Kalonzo Musyoka personally called on China to help reduce global warming.⁵¹⁹ China has agreed to finance \$20 million for the construction of the Lake Victoria Basin Commission, which is responsible for ensuring sustainable development in the Lake Victoria area.⁵²⁰ China has also supported Kenya's bid to upgrade Nairobi's United Nations Environment Programme to organization status, which will provide a stable platform to bring about environmental changes and allow more access to funds.⁵²¹

The strong relationship is likely to continue. Kenyan politicians will likely continue giving requests to the Chinese and China will likely continue offering assistance. On September 27, 2012, Liu Guangyuan, the Chinese ambassador to Kenya, expressed commitment to continue developing the Chinese-Kenyan relationship.⁵²² Vice President Musyoka responded that Kenya will continue to support the One-China policy.⁵²³

There are several trends that could negatively affect the government's view of China. Most important is China's negligence to substantially support AMISOM. The stability of Somalia is of high importance to the Kenyans, and Vice President Musyoka has asked China to support AMISOM forces.⁵²⁴ While the United States has extensively trained and equipped AMISOM, China has only donated just under \$5 million.⁵²⁵ Another trend is the possibility that Chinese support weakens in the case of civil strife after March 2013 presidential elections.⁵²⁶ The Kenyan government may also face a backlash from the people if taxes and levies are implemented to pay for Chinese-constructed projects.⁵²⁷

Social

It is highly likely that positive Kenyan perceptions of Chinese involvement in their country will continue to improve over the next three to five years due to strong facilitators of cultural exchange and current perceptions of Chinese activities.

- ❖ 71% of Kenyans have a favorable opinion of the Chinese overall (2011)⁵²⁸ while 63% believe that Chinese activities in Kenya help their country somewhat or a lot.⁵²⁹
- ❖ 84% of Kenyans see China as more of a partner country⁵³⁰ and 65% believe that a stronger Chinese economy is beneficial for them.⁵³¹
- ❖ There are two Confucius Institutes in Kenya providing cultural exchange and Chinese language programs.⁵³²
- ❖ Direct flights between Nairobi and Hong Kong and Guangzhou promote cultural exchange and business.⁵³³
- ❖ 81% of Kenyans perceive Chinese economic relations with other states as fair for the recipient. Kenyans perceive the importance of economic relations with China to become more important in the next 10 years, surpassing relations with the EU and US.⁵³⁴
- ❖ Chinese Central TV (CCTV) opened its first foreign broadcasting hub in Nairobi early 2012 and will further expose Kenyans and East Africans to Chinese culture and ideas.⁵³⁵

However, the following may negate the positive trend in public perceptions and lead to declining views of Chinese activities in Kenya.

- ❖ The negative trade balance deepens,⁵³⁶ indicating further market losses domestically and internally for Kenyan producers and exporters.⁵³⁷
- ❖ Labor disputes and employment opportunities fall significantly because of Chinese hiring practices which favor Chinese for skilled laborer and management positions.⁵³⁸
- ❖ The number of Chinese involved with trading and manufacturing in Kenya strains domestic enterprises and negatively affects employment.⁵³⁹

Analytic Notes

Source Confidence: High

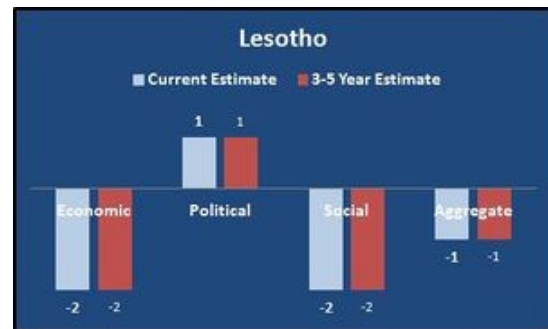
Analytic Confidence: High

Lesotho

It is likely that the overall perception of Lesotho toward Chinese activities will be weakly negative over the next three to five years, with business and social perceptions likely remaining strongly negative and politician perspectives likely becoming strongly positive.

Economic Narrative Report

Despite Lesotho politicians' attempts to strengthen ties to China, it is highly unlikely that business in Lesotho will view Chinese activities in Lesotho as positive over the next three to five years. Lesotho faces some of the most direct competition from China in exports, leading to a decrease in Lesotho exports. In particular, Lesotho's textile industry has been the most negatively impacted. Coupled with a large trade deficit with China, there is little evidence that Lesotho business is likely to view Chinese activities positively over the next three to five years. However, as Western aid and investment in Lesotho has decreased in the financial crisis years, some in the Lesotho business community have begun to look toward China to make up that difference, possibly impacting relations positively in the future.



In 2005, the most recently available data for Lesotho, 90% of Lesotho's exports faced direct competition from Chinese exports around the world. It is highly unlikely that this number has changed drastically since this time.⁵⁴⁰ The vast majority of this competition came from the textile industry. Currently in Lesotho, the apparel sector is the largest industry, accounting for 18% of GDP, 70% of manufacturing, between 60% and 75% of total exports, and employs 50% of its workforce.^{541 542} Negative sentiments from local Lesotho citizens have reached a point that now concerns local Chinese in Lesotho. In a 2011 to 2012 survey of Chinese business owners in Lesotho, not a single interviewee indicated they wished to remain in Lesotho. This was in large part due to increasing threats from local Basotho. The report noted that Chinese "traders have become fearful of the rising tide of resentment amongst locals, fuelled by China's perceived dominance over many sectors."⁵⁴³



Protests in Lesotho against Chinese run textile firms in 2012

Due in part to the global recession and competition from Chinese apparel companies, exports to major Lesotho markets has decreased by approximately 15%. In particular, Lesotho's largest market, the US, has decreased trade over the past five years, forcing some 15 out of 42 Lesotho apparel manufacturers to the brink of closing.^{544 545} Interestingly, of the 42 apparel firms in Lesotho, 10 are headquartered in China, 17 in Taiwan, and only one in Lesotho.⁵⁴⁶ The Chinese and Taiwanese based firms export primarily to the US and utilize significant numbers of Chinese for its workforce in Lesotho. The trend of Lesotho apparel has been negative over the past decade and is expected to continue its downward slide.

Like a large number of Sub-Sahara African countries, Lesotho also suffers from a trade deficit with China, approximately a 97% deficit in the case of Lesotho.⁵⁴⁷ In an attempt to develop closer ties, China has agreed to remove tariffs on 95% of Lesotho's exports, specifically 45 different products of Lesotho, as of 2011. A large portion of the products exported to China include wool that in turn is made into competing apparel in China.⁵⁴⁸

This poor business relationship and view of China come despite Lesotho political attempts to strengthen ties. In a number of recent interviews and speeches, Chinese and Lesotho officials continue to encourage strong relations and trade relations.⁵⁴⁹ As Western aid to the country has decreased over the past decade, Lesotho is looking to China to fill the gaps.⁵⁵⁰ Although Lesotho politicians may see potential for business in and with China, business is slow to agree. On the whole, Lesotho locals continue to lash out against many local Chinese businesses with the view that they have a negative impact on their country.^{551 552 553}

Political

Lesotho politicians' positive views of Chinese activities are likely to be strongly positive over the next three to five years. Key supporting facts include:

- ❖ Lesotho politicians are looking to China to make up the gap in investment and grants from an increasingly non-present West.⁵⁵⁴
- ❖ In a meeting between the Chinese Vice Minister of Commerce and the Lesotho Foreign Minister, the two signed two new economic and technical agreements, providing approximately USD20 million in grants and low-interest loans.⁵⁵⁵
- ❖ A Basotho anti-corruption detective was forced to flee due to death threats after an investigation into a government minister, two principal secretaries, and a deputy principal secretary was made public. The investigation focused on politicians assisting Chinese in applying for visas to illegally work in Lesotho and South Africa.⁵⁵⁶ The investigation supports rampant accusations of Lesotho political corruption in support of China.⁵⁵⁷
- ❖ In recent years, Lesotho politician visits to China have been on the increase. If this continues, it could signal the Lesotho government's continued positive view of Chinese.⁵⁵⁸
- ❖ China's Vice Minister of Commerce handed over the new Lesotho parliamentary building in June 2012, a project funded and completed by Chinese firms.⁵⁵⁹

However, recent elections have the possibility of turning rising positive political views of China

- ❖ With the election of Thomas Thabane as Prime Minister in a coalition government with the All Basotho Convention (ABC) party, political ties and perceptions of Chinese may weaken.
- ❖ During his campaign, Thabane stated that the "relationship between China and Lesotho is one-sided because it benefits only the Chinese."⁵⁶⁰
- ❖ The ABC party signaled during the campaign intentions to halt Chinese influence in Lesotho and encouraged anti-Chinese sentiment.^{561 562} If Prime Minister Thabane and his Party adhere to campaign rhetoric, relations and views of China may diminish greatly.

Social

Lesotho citizens, rural and urban, are highly likely to maintain a strong negative view of Chinese. Key supporting arguments include:

- ❖ In a 2012 publication, one Lesotho interviewee noted on the local population's view of the Chinese, saying the Lesotho government and Chinese are joint partners in the exploitation of the Basotho people.⁵⁶³
- ❖ High unemployment is often linked by locals to Chinese competition, especially in the textile industry.^{564 565}
- ❖ Lesotho has a short history of Chinese in the country with most Chinese having come within the last ten years. Lesotho is also one of the only Sub-Saharan countries where local Chinese indicate they do not plan to remain in the country.^{566 567}
- ❖ A high trade imbalance with China is shown to negatively impact local views of China.⁵⁶⁸ Lesotho has a nearly 99% trade deficit with China, often flooding Lesotho with cheap Chinese goods, hurting locals.⁵⁶⁹
- ❖ Low Chinese FDI correlates with a low opinion of Chinese.⁵⁷⁰ Currently, Chinese FDI in Lesotho remains among the lowest in Sub-Saharan Africa and is unlikely to break 1% of total Chinese FDI in SSA.⁵⁷¹ Lesotho also has no agreements with China to increase FDI.⁵⁷²
- ❖ Local Lesotho citizens are concerned that their government is too friendly toward China.⁵⁷³

However, factors that could create a more positive view of Chinese by Lesotho citizens include:

- ❖ High support for democracy and human rights has been shown to correlate with a negative view of Chinese.⁵⁷⁴ Lesotho has a moderately positive view of democracy and human rights that has been decreasing since 2003, suggesting the possibility of an increase in positive views among Lesotho citizens.⁵⁷⁵
- ❖ The Chinese owners of large corporations, particularly in the textile industry, are seen as major employers and viewed more positively in general, although conditions are still considered poor.⁵⁷⁶ Additionally, if joint Lesotho-Chinese ownership continues to grow, positive views are likely to grow.⁵⁷⁷

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Liberia

Liberian businesses, citizens, and political elites all currently perceive Chinese activity in Liberia positively; while political elites' perceptions and popular perceptions are likely to improve over the next three to five years, business perceptions are likely to decline owing to government policies which support Chinese led development at the expense of domestic business.

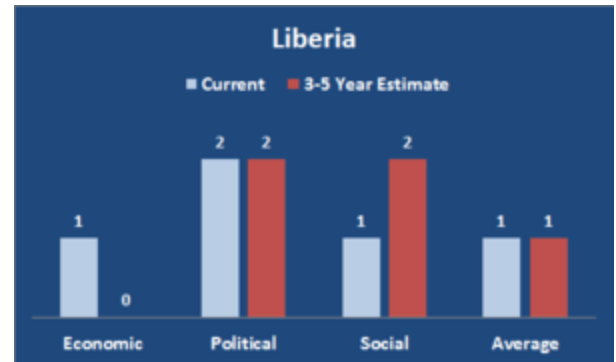
Economic

Business perceptions of Chinese activity in Liberia are positive and likely to decline over the next three to five years owing to Chinese domination on the domestic market and the resulting low domestic entrepreneurial activity potential.

- ❖ Development aid donations by China utilize Chinese construction companies to complete infrastructure projects.^{578 579 580}
- ❖ Chinese Business of Association of Liberia opened in 2012 and advances Chinese business interests in Liberia⁵⁸¹ which likely harms domestic enterprises.
- ❖ FDI in the country totaled nearly 30 million USD in 2010, and though small compared to other trading partners,⁵⁸² it has increased substantially since 2004.⁵⁸³
- ❖ Liberia has a -99% trade deficit with China,⁵⁸⁴ indicating an underdeveloped economy⁵⁸⁵ and a domination of the domestic market by imports; domestic producers are unable to compete and have high production costs.^{586 587}

However, business attitudes may remain positive due to:

- ❖ Continued aid and investment that includes training and employment opportunities may additionally positively affect domestic enterprise development.⁵⁸⁸



Political

Politicians' view of Chinese activities in Liberia is positive and likely to continue an upward trend over the next three to five years.

- ❖ Chinese support as peacekeepers and mediators as part of UNMIL⁵⁸⁹ and garnered political support of China in Liberia.^{590 591}
- ❖ USD10 million of Liberian debt owed to China was forgiven in 2007.⁵⁹²
- ❖ Chinese waiver of tariffs on Liberian imports to China.⁵⁹³
- ❖ Chinese aid and development projects include: education institutional support,⁵⁹⁴ medical development programs and equipment totaling USD1.5 million this year,⁵⁹⁵ and a recently completed USD60 million government complex.⁵⁹⁶
- ❖ Additional USD6.35 million has been committed since late 2011 for infrastructure development⁵⁹⁷ and Chinese companies are bidding on projects to rebuild the Coffee Mountain hydro-electric plant⁵⁹⁸ in a country where less than 1% of the population has access to public electricity.⁵⁹⁹

Conversely, the political perceptions may be negatively affected by the following.

- ❖ Substantial resource extraction concessions such as the 2009 USD2.6 billion mining concession⁶⁰⁰ do not lead to significant employment opportunities.
- ❖ Chinese FDI was only 12.5% of total FDI into Liberia,⁶⁰¹ and substantial FDI by the US and EU⁶⁰² may garner more political support for those countries at the expense of China.

Social

Liberian perceptions of Chinese activity in Liberia are highly likely to improve over the next three to five years because of reconstruction efforts supported by China.

- ❖ Increasing aid and development projects since the end of the Liberian Civil War.^{603 604}
- ❖ Positive involvement of Chinese peacekeepers in UN mission in Liberia.^{605 606}
- ❖ Scholarship program and Chinese aid directed at Chinese language learning in Liberia.^{607 608}
- ❖ China's forgiveness of Liberian debt⁶⁰⁹ improves popular perceptions.
- ❖ Medical program and equipment aid and investment.⁶¹⁰
- ❖ 77% of the population believes Chinese activity in their country “helps a lot” or “helps somewhat” (2008).⁶¹¹
- ❖ USD6.35 million in aid committed in 2011 contributes to popular support of further Chinese involvement in Liberia.⁶¹²
- ❖ The Confucius Institute in Monrovia provides Chinese language programs and cross-cultural learning opportunities.⁶¹³

However, the following indicators may negatively affect public perception of Chinese involvement in Liberia.

- ❖ The trade deficit is -99% and indicates a weak economy that is unable to produce competitive exports on the scale necessary to develop the economy.⁶¹⁴
- ❖ Liberia’s underdeveloped economy⁶¹⁵ may become dependent on Chinese imports, negatively affecting employment and development.

Analytic Notes

Source Confidence: Medium

Analytic Confidence: High

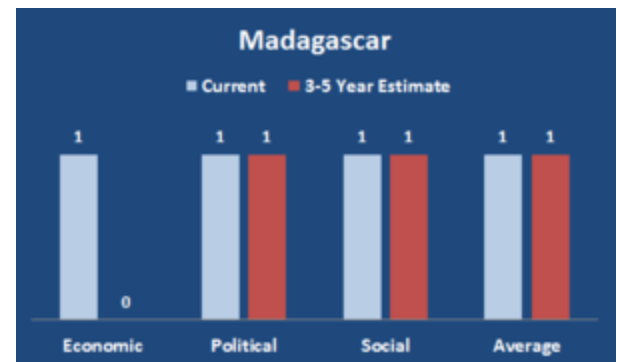
Madagascar

Perceptions of Chinese activity in Madagascar are divided among the three major categories, but positive popular and political perceptions are likely to increase over the next three to five years, while positive business perceptions are likely to decrease owing to rising competition from Chinese products and dependence on China for trade.

Economic

Positive business perceptions of China are likely to decline in next three to five years due to dependency on trade with China.

- ❖ A growing trade imbalance,⁶¹⁶ indicative of market losses and an inability of domestic producers to compete with Chinese imports.⁶¹⁷
- ❖ Current dependency on China stemming from a 2009 coup and a decreased ability to work with traditional trading partners.⁶¹⁸
- ❖ Decreased export markets and frozen assets since 2009 may force businesses to accept below-market prices on sales to China.⁶¹⁹
- ❖ Weak market institutions⁶²⁰ allow Chinese businesses with political backing to unevenly compete with domestic enterprise.⁶²¹



Conversely, unresolved political relations with the West after 2013⁶²² may force business to continue to pursue working relationships with China.

Political

Positive perception of China among Madagascar's political elite is likely to remain positive but may decline over the next three to five years.

- ❖ Political perceptions of China are dependent on the outcome of the 2013 presidential and parliamentary elections following the 2009 coup.⁶²³
- ❖ After the 2009 coup, the interim government became more dependent on Chinese support⁶²⁴ due to China's policy of noninterference.⁶²⁵
- ❖ Madagascar's political elite funneled aid through China to maintain infrastructure and social development projects when the EU and US discontinued funding following the coup.⁶²⁶
- ❖ Previous regime changes have led to a cyclic pattern of pursuing relations with France, its previous colonial power, and other third world states.⁶²⁷
- ❖ Election dates have been stalled multiple times since 2009;^{628 629 630} further delays may contribute to additional international isolation and a greater political dependence on China.

Social

Positive perceptions of Chinese activities in Madagascar among Malagasys are highly likely to increase over the next three to five years due to positive cultural interactions and Chinese involvement in development.

- ❖ Historic population of Chinese which now numbers about 40,000, largely from Taiwan and southern China.⁶³¹
- ❖ High visibility of Sino-Malagasy population which are largely centered in cities and involved with retail and wholesale industry.⁶³²

- ❖ Chinese development programs have continued where Western aid programs have stopped since 2009 coup.⁶³³
- ❖ Social development programs funded and completed by Chinese government include scholarships and the commissioning of elementary schools.⁶³⁴
- ❖ Employment opportunities associated with Chinese trade; Madagascar serves as a waypoint for Chinese textile goods which are completed in Madagascar before export to EU and US.^{635 636}
- ❖ Chinese imports provide inexpensive consumer goods where domestic manufacturing capabilities are scarce.⁶³⁷
- ❖ 79% of population perceives Chinese activities in Madagascar are “somewhat helpful” or “very helpful.”⁶³⁸

However, the following factors may negatively affect perceptions of Chinese activities.

- ❖ Continued importation of inexpensive Chinese goods and the expansion of Chinese extractive activities may lead to decreased popular support for China.⁶³⁹
- ❖ Elections in 2013 may relieve political conflict with EU, US, and southern Africa,⁶⁴⁰ reestablishing traditional socio-economic ties.⁶⁴¹

Analytic Notes

Source Confidence: Medium

Analytic Confidence: Medium

Malawi

It is likely that the overall perception of Malawi toward Chinese activities will be weakly positive over the next three to five years, with economic perceptions trending downward.

Economic

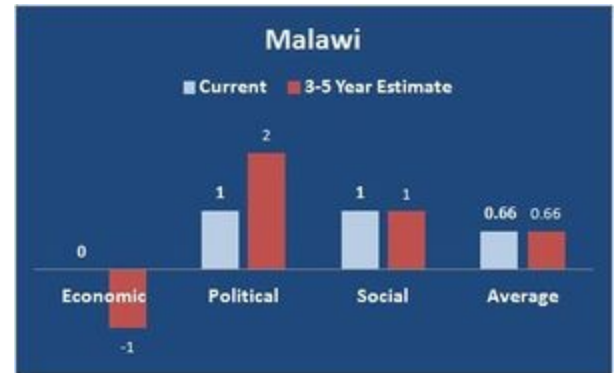
It is likely that current neutral perceptions will have a downward trend in the next three to five years.

Supporting facts include:

- ❖ A memorandum of understanding between Malawian and Chinese officials covering industry, trade, and investment was signed in May 2008. This action committed China to help increase Malawi's production in tobacco, cotton, mining, forestry, and fertilizer.⁶⁴²
- ❖ A 2010 report from Malawi's ministry of trade indicated that the value of trade between the two countries doubled since 2007, reaching USD100 million in 2010.
- ❖ China's ambassador to Malawi, Pan Hejun, expressed the significance of the building and construction of new hotels, administrative buildings, and other projects supporting foreign tourists and investments.⁶⁴³

However there are some issues affecting the economic relationship between the two countries

- ❖ In January, police at the international airport caught Zhang Xiang-quian, a senior member of the Shanghai Construction Company, trying to smuggle 3.5 kg of ivory bangles, curios, and necklaces out of the country.⁶⁴⁴
- ❖ Additionally, Yani Huang, a Chinese businesswoman, was arrested and fined for violating foreign exchange controls in November 2010, when she tried to leave the country with an undeclared USD18,350.⁶⁴⁵
- ❖ Local traders are nervous about growing Chinese competition. "Some are setting up small-scale businesses and competing with indigenous, local traders. They are making life difficult for us," Maddy Gawani, a trader who runs a clothing shop in Lilongwe.⁶⁴⁶
- ❖ There have been complaints about the quality and durability of Chinese products on the market.⁶⁴⁷
- ❖ When Chinese companies first arrived in Malawi, they were paying local workers USD13 per month, well below the minimum wage. Although these issues have been addressed, nothing has been done to expedite or even start the process of improvement.⁶⁴⁸



Political

It is likely that current positive perceptions will have an upward trend in the next three to five years. Supporting facts include:

- ❖ Malawi officially recognized the People's Republic of China in 2007, after a long history of relations with Taiwan.⁶⁴⁹
- ❖ Chinese Ambassador Hejun said recently, "China's relationship with Malawi is not based on personalities or individuals, rather it is between two governments."⁶⁵⁰
- ❖ Hejun also added, "In the first place our political system is democratic and even more advanced than our western friends. When we talk of democracy don't just look at elections, we believe democracy without basic food, no medical services, poor roads and housing infrastructure is nothing. That is why our political system values the well being

of citizens and their freedoms. Our relationship with Malawi is based on mutual benefit because we don't regard ourselves as a donor but rather we are a development partner so we are on an equal footing."⁶⁵¹

- ❖ Malawi's president, Bingu wa Mutharika, has declared himself satisfied with his government's relations with China. In a recent speech, Mutharika said, "The Chinese projects come with 'no strings attached.' The People's Republic of China has demonstrated that they are good friends of Malawi."⁶⁵²

Social

It is likely that current positive perceptions will remain positive in the next three to five years.

Supporting facts include:

- ❖ In a fairly recent speech given by Ambassador Hejun, he explained, "We want to strengthen the mutual understanding between our two countries and let our two peoples know each other better. We have taken concrete actions to promote the people-to-people exchanges, including the exchanges in the religious circle of our two countries." Equality and mutual respect are the principles guiding the development of China-Malawi relations."⁶⁵³

Despite this, economic issues plaguing Malawian citizens have negatively affected their views of Chinese activities in Malawi."⁶⁵⁴

- ❖ Hejun recently said however, "Malawi should also expect a surge in terms of foreign direct investment (FDI) inflow from China which he said will help create jobs and grow the economy, among other benefits."⁶⁵⁵
- ❖ Additionally, China provides 30 government scholarships every year to Malawian students to further their education."⁶⁵⁶

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Mali

It is likely that positive perceptions of Chinese activities in Mali will remain positive or grow in all three sub-groupings over the next three to five years. Current neutral perceptions among political elites are due to the recent coup and uncertain relations between Mali and China and are likely to improve. Popular perceptions of China are additionally likely to improve while weak positive perceptions among businesses in Mali are likely to improve only slightly.

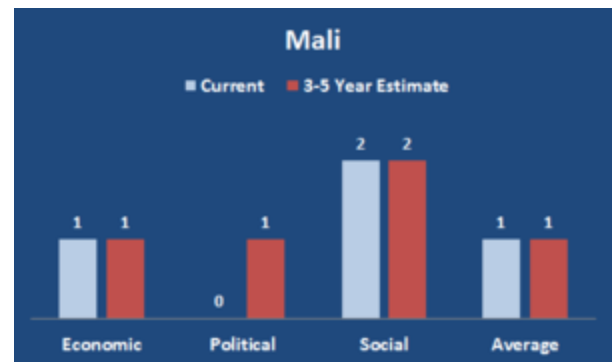
Economic

Business perceptions of Chinese activity in Mali are positive and likely to remain weakly positive over the next three to five years.

- ❖ Malian business people find it easy to buy Chinese finished goods wholesale and resell the products on the domestic market. Additionally, Malian businesses are more involved in this trade than Chinese businesses unlike other SSA states where Chinese businesses are increasingly involved in retail.⁶⁵⁷
- ❖ Mali's largest export, cotton, is heavily dependent on trade with China,⁶⁵⁸ who buys roughly one third of the cotton crop in Mali.⁶⁵⁹
- ❖ China was Mali's second largest trading partner after South Korea in 2011 and is largely dependent on commodity sales.⁶⁶⁰ Additionally, Malian exports to China have increased from roughly USD37million in 2009 to USD149 million in 2011.⁶⁶¹

However, political uncertainty in Mali and negative impacts on domestic business by Chinese activity in the economy may reverse the slight upward trend.

- ❖ Chinese economic activity is reportedly more varied than in other Sub-Saharan African states. Rather than focusing on retail and wholesale trade as in other regions, the Chinese in Mali have invested in hotels, restaurants, and some manufacturing.⁶⁶² While this may positively impact Chinese integration it will expand the competition facing domestic business.
- ❖ The percentage of the population buying Chinese goods is relatively high and negatively impacts domestic production. Regarding products traditionally produced in Mali, a poll by African Economic Research Consortium shows that 51% of the population bought Chinese food products, 69% bought clothing and other textiles made in China, and 63% purchased shoes and leather products from China.⁶⁶³



Political Narrative Report

Perceptions of Chinese activity in Mali among the ruling political elite are neutral and likely to improve over the next three to five years. The current perceptions are largely due to political uncertainty following Mali's coup in March 2012 and the undefined foreign relations attitude of the new regime. However, in recent months the new regime has made moves to legitimize its position and China has actively engaged the regime. A major uncertainty is African Union (AU) proposed democratic election in April 2013; however, relations will likely improve with China with or without a democratic election.

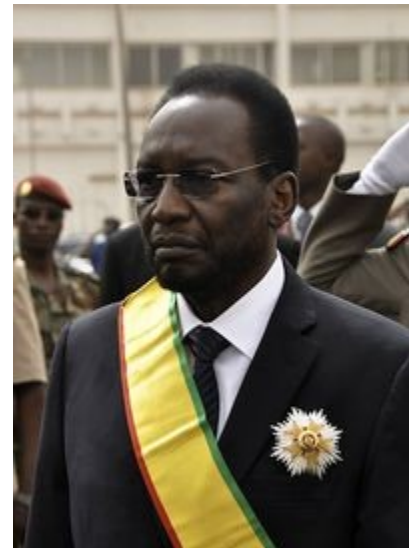
Military unites staged a coup against the democratically elected government starting the 21st of March due to discontent with the mismanagement of the military and lack of support from the democratically elected president of Mali, Amadou Toure.⁶⁶⁴ Immediate international reactions were negative, the AU temporarily suspended Mali's membership, the World Bank, US, and EU cut or threatened to cut aid, and China condemned the coup.⁶⁶⁵ China's initial reaction fell in line with the rest of the world though impaired the relationship with the de facto leadership.

Following the coup, the military formally handed over power to the interim president, Dioncounda Traore, in May.⁶⁶⁶ Recognizing the ongoing conflict in the north of the country between Toureg rebels and the interim government, Traore requested military aid from ECOWAS states and France and China offered to provide additional military assistance in any international efforts against the Islamist rebels.⁶⁶⁷ China's willingness to work with and legitimize the interim government positively affects the regime's perception of China.

On October 24, 2012, the AU published a report detailing the steps necessary to hold a presidential election by April 2013 and lifted Mali's membership suspension.⁶⁶⁸ The AU's acceptance of the interim government and willingness to work with it toward holding democratic elections further increases its legitimacy and is likely to improve its relations with other states.

Prior to the coup, there were positive perceptions of Chinese activities in Mali among politicians and those in government. Mali is a least developed state,⁶⁶⁹ and 15% of GDP in 2009 was international aid.⁶⁷⁰ According to a Malian minister in 2010, the Malian government preferred Chinese "turn-key" aid agreements which stipulated the use of Chinese contractors in infrastructure development projects because they were more straightforward than similar projects led by other donors like the EU and US.⁶⁷¹ The economic benefits of Chinese involvement in Mali are substantial; of Mali's largest export, cotton, China buys roughly one third.^{672 673}

However, the perceptions of Chinese involvement may deteriorate if the interim government does not allow democratic elections to take place in 2013 as outlined by the African Union. Should the elections not take place, international reaction, including China, will be negative and likely isolate the regime.



Mali Interim President Amadou Toure

Social

Positive popular perceptions of Chinese activities have improved recently and are highly likely to improve over the next three to five years.

- ❖ Popular perceptions of Chinese involvement in Mali improved from 2008 to 2010. 67% of Malians stated that Chinese activity in Mali was “helped somewhat” or “helped a lot” in 2008.⁶⁷⁴ Positive perceptions among Malians increased to 80% in 2010 when asked the same question by the same polling agency, Afrobarometer.⁶⁷⁵
- ❖ Only 4.5% of Malians are deterred from buying Chinese goods because of low quality to price ratios or poor overall quality according to a poll conducted by the African Economic Research Consortium.⁶⁷⁶
- ❖ According to the Center for Chinese Studies (CCS) at Stellenbosch University in South Africa, Chinese entrepreneurial activity in Mali is more varied than other SSA. Rather than focusing on retail or wholesale trade, Chinese in Mali are involved in several different industries including, but not limited to: hotels, restaurants, infrastructure and construction, and manufacturing. The CCS notes that this increases positive integration of Chinese in Mali and may contribute to positive perceptions.⁶⁷⁷

However, the recent political instability may contribute to a deterioration of relations and negatively affect popular perceptions of Chinese activity in Mali.

Analytic Notes

Source Reliability: High

Analytic Confidence: Medium

Mauritania

It is likely that overall Mauritanian views of Chinese activities in their country will remain weakly positive over the next three to five years.

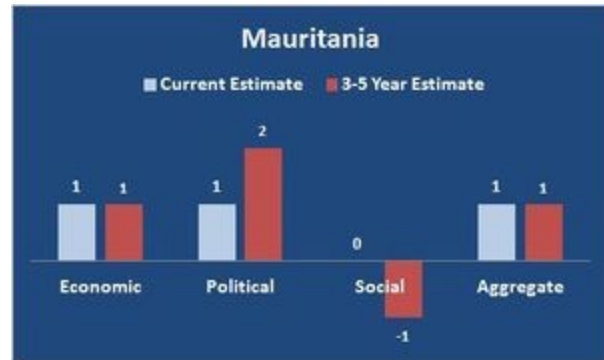
Economic

It is likely that Mauritanian businessmen's view of China will remain weakly positive over the next three to five years due to export potential.

- ❖ Mauritania has a huge trade surplus with China, over USD1 billion.⁶⁷⁸
- ❖ Chinese Foreign Direct Investment in Mauritania has risen from USD90,000 in 2004 to around USD6 million in 2010.⁶⁷⁹
- ❖ China is a large market for Mauritanian exports. Mauritania first developed oil for exports in March 2006 and sent its first shipment to China.⁶⁸⁰ China is the largest market for Mauritania's iron ore, importing 60% of Mauritania's exports, around 6.1 million tons.⁶⁸¹
- ❖ The Chinese renovated Nouakchott Port with a loan of USD295 million.⁶⁸²

However, a recent fishing deal has greatly damaged the fishing industry's view of China

- ❖ A Chinese firm has gained the rights to offshore fishing for 25 years. Fishermen are angry over the deal's lack of transparency and threw eggs at parliament members.⁶⁸³ It is estimated that up to 40,000 local fishermen will be hurt by the deal.⁶⁸⁴ However, the Ministry of Fishing maintains that Mauritania will gain the benefits of fish caught by the Chinese.⁶⁸⁵
- ❖ Three Chinese investors in the fishing industry attempted to bribe the General Director of Taxation. The general director called the police and had them arrested.⁶⁸⁶



Political

It is likely that Mauritanian politicians' weakly positive view of China will improve weakly over the next three to five years due to friendly historical relations and efforts to improve ties.

- ❖ A Passage to Mauritania, a paper produced by the Mauritanian embassy to China, highlights the positive historical relations between the two countries and outlines opportunities for the countries to increase cooperation.⁶⁸⁷
- ❖ President Mohamed Ould Abdel Aziz made his first state visit to China on 19-23 September 2011 where he touted the countries' 46 year relationship.⁶⁸⁸ The countries signed a USD3.1 million agreement for the development of the Mauritanian army.⁶⁸⁹
- ❖ Presidential candidates have favored China during the past several elections.⁶⁹⁰
- ❖ China has remained neutral on the Western Sahara issue.⁶⁹¹

Social

There is a lack of information on Mauritanian citizens' views of China. It is estimated that their view of China is currently neutral, but it is likely that their view will become weakly negative over the next three to five years.

- ❖ It is likely that the controversy surrounding the fishing deal will negatively affect social views of China since half the population subsists on fishing, agriculture, or livestock.⁶⁹²
- ❖ President Abdel Aziz was shot non-fatally on 13 October 2012. There are wide speculations of an attempt on his life to initiate a coup, but they are unconfirmed. Abdel Aziz is widely unpopular, and perceived Chinese support of his regime could further a negative view of China among the public.⁶⁹³
- ❖ Mauritanian newspaper Le Calame blamed an airplane crash that killed military officials on poor Chinese craftsmanship. The author went on to criticize the quality of other Chinese goods.⁶⁹⁴

However, increased Chinese investment in social projects could reverse the trend

In February 2009, the two countries signed a deal in Nouakchott that would provide USD100 million for a hospital, commercial center, warehouse, solar energy, urban transport project.⁶⁹⁵

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Low

Mauritius

It is likely that the overall perception of Mauritius toward Chinese activities will be weakly positive over the next three to five years, with mainly neutral perceptions growing positively in all three sub-groupings.

Economic

Positive business perceptions of Chinese activities are likely to remain weakly positive

- ❖ Mauritius has experienced massive development over the past several decades.
- ❖ Since the establishment of diplomatic relations between China and Mauritius, the economy, trade relations, and the economic and technological cooperation of the two countries have seen a favorable development. After the establishment of diplomatic relations, China began to provide Mauritius with multiple types of aid and assistance. So far, China has already aided Mauritius to build a stadium, bridges and airport terminal building, activity centers for the aged, and living quarters of low prices and other projects.⁶⁹⁶
- ❖ The total value of the workforce undertaking contracts signed between the two sides reached USD424.52 million.⁶⁹⁷
- ❖ In May 2012, China and Mauritius recognized the 40th anniversary of the start of diplomatic relations.⁶⁹⁸

Although largely positive views persist, there is still a strong imbalance in trade between the two countries. China is not a major export partner with Mauritius, and China accounts for 11.5% of Mauritius' imports.⁶⁹⁹

Political

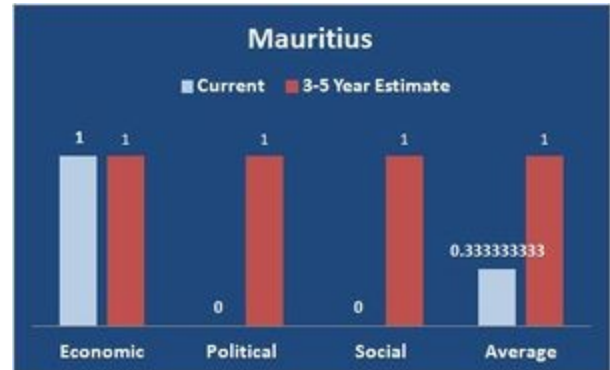
Neutral political perceptions are likely to trend upward, leading to weak positive perception in three to five years. Key supporting faces consist of:

- ❖ Since the establishment of the diplomatic relations of China and Mauritius in 1972, the relationship between the two countries has seen a favorable and steady development.⁷⁰⁰
- ❖ Mauritius has supported Beijing's policy on Taiwan since 1972. In return, Mauritius has asked China for its continued support with Mauritian sovereignty claims on the Chagos Islands, part of Mauritius since independence.⁷⁰¹

Social

Neutral social perceptions are likely trending positively, leading to weak positive social views in three to five years.

- ❖ Mauritius and China have a 40 year history of political, economic, and social relations.⁷⁰²
- ❖ Chinese exports to Mauritius have more than doubled between 2000 and 2008, propelling China into the ranks of Mauritius' major trading partners.⁷⁰³
- ❖ Cheap Chinese imports benefit consumers the most. These gains are likely to be smaller after adjusting for the poorer quality of Chinese products. Conversely, import-competing producers have been most affected by Chinese import competition.⁷⁰⁴



Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Mozambique

It is likely that Mozambique's perception on Chinese activities will be strongly positive over the next three to five years. This is mainly due to a strong economic and political relationship between the two countries.

Economic

Positive economic perceptions will likely be strongly positive over the next three to five years.

Supporting facts include:

- ❖ According to the Mozambican Central Bank Governor speaking at the Macau Forum in October 2012, both China and Mozambique benefit from bilateral cooperation in infrastructures, agriculture, fisheries, energy and mining industry. He additionally stressed the importance of Macau as the bridge between China and the Portuguese-speaking nations.⁷⁰⁵
- ❖ A major portion of economic support from China is in the form of aid. This includes Chinese grants for public projects, cheap loans, and programs of social, cultural, technical, and humanitarian cooperation. Also, education assistance includes hundreds of scholarships for Mozambican students to pursue higher education in China.⁷⁰⁶
- ❖ In Emmy Bosten's (2006) overview, she sees China as a development partner with great potential but one that is increasingly taking up contracts that previously used to go to South African and European construction firms. China is therefore an economic competitor, not of Mozambique directly, but of installed business interests from other foreign powers. Fortunately this competition has lowered the prices of government projects, which further development in the country.⁷⁰⁷
- ❖ Additionally, China has provided medical assistance to include free medical supplies as well as teams of Chinese doctors to work in Mozambican hospitals. China also provided USD 22million of debt forgiveness in 2001 and another USD20 million in 2007, clearing Mozambican debt accumulated since the 1980s.⁷⁰⁸
- ❖ Chinese companies have carried out nearly a third of all recent road construction, including "important transportation links between the north and south of the country."⁷⁰⁹



Political

Positive perceptions of politicians will likely be strongly positive over the next three to five years. Supporting facts include:

- ❖ The year 2010 marked the 35th anniversary of diplomatic relations between the People's Republic of China and the Republic of Mozambique. The new government of Mozambique continued the friendly policy towards China.⁷¹⁰
- ❖ In Mozambique, politicians have been accepting of China's interest in the country. The government of Mozambique, via the voice of its President, Armando Guebuza, sees China, "as a partner and not a colonizer, because, unlike Western countries, China is committed to developing Africa and has always kept its promises."⁷¹¹
- ❖ Furthermore, President Guebuza went on to say, "those who criticize China are delirious". A former Mozambican foreign minister also noted that, "in the end it's up to us, the Chinese like anyone else have their interests and will plunder us to the extent that

we let them," and for the foreseeable future the Mozambican government is advancing with that mindset.⁷¹²

Social

Weak popular perceptions of regular citizens will likely be weakly positive over the next three to five years. Supporting facts include:

- ❖ According to a September 2012 report by the Portuguese Institute for Social Sciences and Economics indicates that Chinese aid in recent years has become more concerned with improving cultural ties and providing educational assistance to Mozambique. Much of these cultural and educational changes have been run out of Mozambique's new Confucius Center. The Macau public radio and television network has also helped establish a cultural exchange of media.⁷¹³
- ❖ In a 2010 report, polls showed that 70% of Mozambicans viewed China as somewhat or very helpful to their country.⁷¹⁴
- ❖ Economics remains central to China's growing relationship with Mozambique. A large part of China's activity in Mozambique is building infrastructure, often undertaken by Chinese companies.⁷¹⁵
- ❖ Mozambican development also demonstrates that Chinese trade and investment is helping with economic growth, because they are funding projects and undertaking development that few other investors have been willing to back, and are providing results in a cheap and timely manner.⁷¹⁶
- ❖ Some analysts suggest that average Mozambicans believe the Chinese are "looking only after their own interests". However, independent surveys have concluded that Mozambicans generally welcome the Chinese, despite some mistakes they made early in their relationship. The relationship has emerged as mutually beneficial, and China's strong focus on building infrastructure has made it a particularly appealing partner for a nation previously devastated by war.⁷¹⁷
- ❖ On the entertainment side, Chinese companies refurnished the Polana hotel – the most luxurious in Maputo. The new Zimpeto national soccer stadium was another important project for the Chinese, who funded and built the FIFA-approved 42,000 seat venue.⁷¹⁸

Analytic Notes

Source Reliability: High

Analytic Confidence: Medium

Namibia

It is likely that the neutral view of Chinese activities in Namibia will remain weakly positive in the next three to five years.

Economic

It is likely that the positive business perception of China will slightly grow and develop over the next three to five years. This is due to:

- ❖ China supplies the rural area in Namibia with supplies: such has tools and materials to develop the region, and developing the area. China is also working with Namibia to improve the infrastructure of Namibia.⁷¹⁹
- ❖ China's Foreign Direct Investment to Namibia in 2010 was USD5.51 million, an increase from 2005 of only USD0.18 million.⁷²⁰
- ❖ Namibia and China signs four agreement in 2011 relating to: economic and technical cooperation, the provision of medical equipment and materials from China, construction, and aid for flood relief in northern parts of Namibia.⁷²¹
- ❖ Chief Executive Officer of the Namibian Chamber of Commerce and Industry Tarah Shaanika, stated that Namibia sought out to establish an agricultural agreement. He welcomes China investments into Namibia.⁷²²
- ❖ Namibian Ministry of Trade and Industry Undersecretary Edward Kamboua called upon China to work with Namibian partners in a joint effort to extract the oil, and along with natural gas and mineral exploration.⁷²³

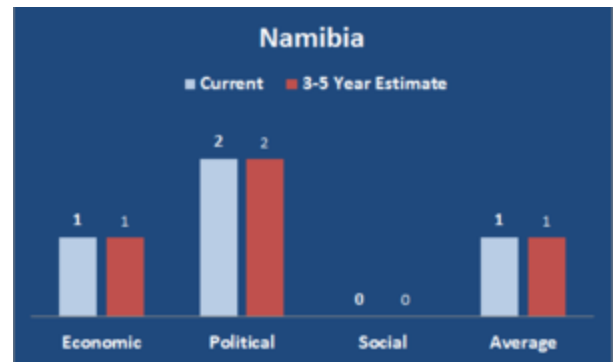
However, there are factors that are contrary to positive development:

- ❖ There are five major Chinese construction companies that are in Namibia that are causing contention for Namibia.⁷²⁴
- ❖ Chinese companies in Namibia higher Chinese workers which has an impact on the unemployment in Namibia. The companies exploit the local workers and often do not follow the country's labor laws.⁷²⁵

Political

It is highly likely that the political relationship with China will continue to grow even stronger over the next three to five years. This is due to:

- ❖ Namibia Deputy Minister of Trade and Industry Tjekero Tweya stated, in the China Import and Export Fair, that Namibia strives to continue to promote trade and relations with China, to benefit both countries. Local Namibia businesses are urged to look into the Chinese businesses and work on joint ventures, and also to create a market in the Chinese markets. Meantime, Chinese businesses are urged to create manufacturing industry's to inspire Namibia to industrialize, to create a win-win situation.⁷²⁶
- ❖ Namibia President Hifikepunye Pohamba illustrates that Namibia values the relationship it has with China for the assistance before and after Namibia's independence. He also mentioned that Namibia will continue to work with China to promote further bilateral cooperation.⁷²⁷ Also, President Pohamba stated that Namibia strongly agrees with the One China policy, that Taiwan belongs with China, and supports reunification.⁷²⁸



- ❖ Namibia's Deputy Parliament Speaker Loide Kasingo stated in a speech that Namibia share's a strong relationship that goes back to Namibia's independence, and that China is a true friend.⁷²⁹
- ❖ Namibia's Speaker of Parliament, Theo Ben Gurirab, reiterated the same message by Kasingo of the strong friendship with China. He also, calls on China to resist the muscles of NATO and EU, because the world belongs to all not only to them.⁷³⁰
- ❖ The Chinese company Wuchang Shipbuilding Industry Company built a naval vessel for Namibia's Navy.⁷³¹

There are a few issues that are starting to brew that can hinder the relationship:

- ❖ There are a few Namibia's government officials curious if China is buying their influence, for example having the scholarships go to the elite in the government.⁷³²

Social

It is likely that the social perspective of China is likely to be neutral in the next three to five years due to:

- ❖ The Chinese government had given scholarships to the Namibia to study in China to improve the education experience. This has caused a fiery fury from many people due to the fact that it was the select and powerful few that received the scholarship, including nine top officials.⁷³³ John a Namibian in response to the scandal of the scholarships going to the elite wrote to a newspaper with a response. John stated that "...our own government is slowly but surely selling us to Chinese for their own, their counterparts and comrades."⁷³⁴
- ❖ In addition, to the scholarship program that has been accused of focusing on elite only. However, recipients have often stated their gratitude toward China for the scholarships. Helena Abed, stated "You won't know how important this is to me...no words can describe my gratitude." Another individual stated, even after being not selected, "...I am still very happy because (the) organization has made such great contribution to Namibian learners..."⁷³⁵
- ❖ In 2008, the Afrobarometer conducted a survey in Namibia with one of the questions was "How much does each of the following do to help your country: China?" The results indicated that most people do have an opinion about China being in their country. And that the people are pretty well divided about China. The figure below shows the results:⁷³⁶

Q98H HOW MUCH DOES EACH OF THE FOLLOWING DO TO HELP YOUR COUNTRY: CHINA?

	Urban	Rural	Male	Female	Total
Do nothing, no help	13	11	13	11	12
Help a little bit	35	31	32	32	32
Help somewhat	20	27	25	24	24
Help a lot	26	23	24	24	24
Don't know	6	8	6	8	7

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Namibia

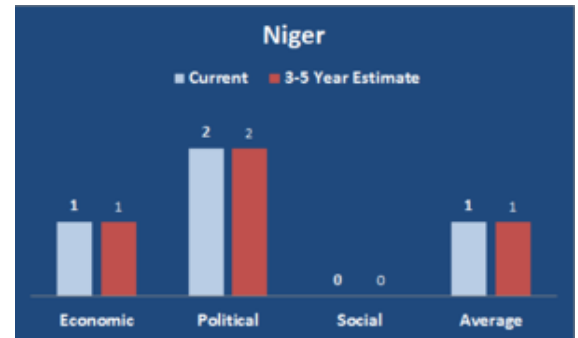
It is likely that the overall view on China will remain neutral in the next three to five years.

Economic

It is likely that the business perspective of China will continue to slightly grow in the next three to five years.

Due to:

- ❖ According to Reuters, China has granted Niger a USD95 million loan to boost uranium mining project.⁷³⁷
- ❖ Niger renegotiated a loan from China's Export-Import Bank, raising the price tag from USD600 million to USD980 million. The loan covers the cost of building an oil refinery.⁷³⁸
- ❖ China plans to invest in the energy and infrastructure in Niger.⁷³⁹
- ❖ The Current Chinese FDI Stock is USD379.36 million.⁷⁴⁰



However, there are factors that indicate a negative view

- ❖ The trade balance with China is -96% according to Niger reports, while China reports it's a -99%.⁷⁴¹

Political

It is likely that the politician's weak positive view will continue to grow, due to the following but limit to:

- ❖ China is the main foreign power that is doing business with Niger following the recent coup that removed Mamadou Tandja from power.⁷⁴² Chinese are pouring money into Niger in the hope of keeping previous contracts and agreements respected.⁷⁴³
- ❖ Niger attaches great importance to friendly relations with China.⁷⁴⁴
- ❖ Niger President Mahamadou Issoufou expects China's help to increase agricultural production. President Issoufou has also stated that the relationship between Niger and China is a win-win situation.⁷⁴⁵
- ❖ Issoufou Issaka Minister of Water Conservancy and Environment of Niger, sincerely thanked the Chinese government and the China Geo-Engineering Corporation International LTD. for the high quality boreholes for Niger and solved the long-term drinking water difficulties of the local people.⁷⁴⁶
- ❖ 29 October 2012, China and Niger signed a two aid agreements of USD25.6 million for the construction of national referral hospital in Naimey, Niger and the purchase of 30 vehicles valued at USD1.9 million.⁷⁴⁷
- ❖ Military spokesman stated, "Our diplomatic relations with China were not affected by the coup."⁷⁴⁸

However, there is likely possible resentment towards China:

- ❖ The former President of Niger Mamadou Tandja, who was overthrown during a military coup, was the first African leader whose downfall could be traced directly to his embrace of Chinese suitors, Tom Burgis a writer for The Financial Times.⁷⁴⁹ Chinese was the financial backbone propping up an autocratic president, giving him the confidence to ignore international condemnation as he chipped away at Niger's democratic institutions, according to The New York Times.⁷⁵⁰ This is likely to bring resentment to politicians in the Niger government.

Social

It is likely that the weak negative social perspective will remain negative in the next three to five years, do to:

- ❖ Mohamed Bazoum, former opposition leader appointed by the junta to a civilian council, stated "The Chinese, they were about to destroy democracy. They were playing a very negative role."⁷⁵¹
- ❖ A number of Nigerien workers, most of whom were Tuareg, in a written statement complained about their treatments for working at the SOMINA uranium mine. The Nigerien's stated their rooms are separate from Chinese and is in an illegal location. The SOMINA employs hundreds of Chinese nationals, which a lot of the jobs can be done by Nigeriens. Claimed by a local.⁷⁵²

However, there are factors that support a stronger relationship:

- ❖ The Chinese does employee Nigerien's for the SOMINA, mostly from the Hausa (people from the southern Niger, while the mine is in the Northern part).⁷⁵³
- ❖ Nam News Network reported that the Soumana Sanda, Niger's Health Minister praised the efficiency of Chinese medical team, mentioned that Niger's health sector benefited in various ways. Medical mission started in 1976 and four million consultations and 170,000 surgical operations have been carried out.⁷⁵⁴

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Low

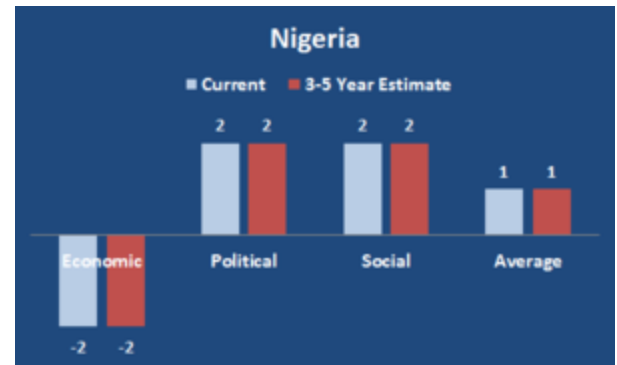
Nigeria

Positive perceptions of Chinese activity in Nigeria among the populace and political elite are highly likely to improve over the next three to five years despite negative perceptions of Chinese activity among the business community due to increased market competition.

Economic

Business persons' negative perception of China is likely to continue to decline over the course of the next three to five years, particularly in the manufacturing sector.

- ❖ There has been a rapid growth of Chinese imports (increasing from USD 3.7 billion to USD9.2 billion between 2007 and 2011) and a large trade deficit which indicates relative losses to Nigerian companies in the face of substantial Chinese gains.⁷⁵⁵
- ❖ Oil and gas accounted for 87% of Nigerian exports to China; conversely, Chinese imports were largely finished manufactured goods, machinery, and consumer products. The unbalanced trade composition indicated negative impacts by Chinese imports on domestic producers of manufactured goods.⁷⁵⁶
- ❖ Substantial damage to textile industry which declined from about 175 textile firms in the 1980's to 25 in 2011^{757 758} and other manufacturing industries due to the influx of Chinese imports.⁷⁵⁹
- ❖ Plans for Chinese companies to move manufacturing operations to Nigeria, negatively affecting Nigerian owned businesses.^{760 761}
- ❖ Infrastructure projects are financed by China and stipulate the use of Chinese contractors ("turn-key" aid).⁷⁶² Chinese financing of Nigerian infrastructure projects ranging from bridges, roads, airports, etc. all negatively affect domestic contractors who are underbid by Chinese companies.
- ❖ Nigerian business will likely experience future losses to Chinese commercial activities due to social perceptions of the importance of Chinese business and activities in Nigeria.^{763 764}



However, the influx in Chinese business may positively affect Nigerian companies

- ❖ The growing number of Chinese in Nigeria may allow for joint ventures; there were an estimated 50,000 Chinese in Nigeria in 2010 and the upward trend is likely to continue.⁷⁶⁵
- ❖ Chinese FDI in Nigeria has increased every year observed (2004-2010) and is unlikely to abate.⁷⁶⁶
- ❖ 20-30% of companies involved in the Lekki Free Trade Zone are Chinese and may legitimize the FTZ and may benefit investment in Nigerian business.⁷⁶⁷

Political

It is highly likely that Nigerian politicians' positive perception of China will grow over the next three to five years due to the following.

- ❖ Recent (2011) bilateral agricultural development agreement that supports Nigerian self-sufficiency in food production.⁷⁶⁸
- ❖ Government supported trade⁷⁶⁹ with China which has resulted in a massive influx of investment and imports.^{770 771}

- ❖ Focus of Chinese investment and aid toward infrastructure programs which mobilize popular support of Nigerian government and Chinese.⁷⁷²

However, factors which may ebb political support for China are largely linked to economic degradation at the hands of Chinese activities in Nigeria.

- ❖ Substantial Chinese textile imports which have severely hampered the Nigerian textile industry and led to an estimated 650,000 lost jobs.^{773 774 775}
- ❖ Negative public perceptions toward Chinese imports and low quality, Chinese consumer goods⁷⁷⁶ which may erode support for pro-Chinese trading policy on manufactured goods.
- ❖ Damaging effect of Chinese imports on other manufacturing industries in Nigeria and ability of Nigeria to export to other regional partners.⁷⁷⁷

Social

It is highly likely that positive Nigerian perceptions of Chinese activity in Nigeria will continue to grow, largely due to increasing economic trade, a perception of increasing Chinese importance in Africa evidenced by considerable enterprise activity and expatriate communities in Nigeria.

- ❖ Chinese construction companies are heavily involved with infrastructure development projects and employ thousands of Nigerian laborers.⁷⁷⁸
- ❖ There are two Confucius centers in Nigeria providing Chinese language instruction and facilitating cultural exchanges.⁷⁷⁹
- ❖ An estimated 50,000 Chinese live in Nigeria. Most are involved with importation, manufacturing, and retail.⁷⁸⁰
- ❖ Annual Chinese FDI in Nigeria increased four-fold between 2004 and 2010.⁷⁸¹
- ❖ 55% of Nigerians believe China helps their state (2010).⁷⁸²
- ❖ Nigerians perceive relations with China to increase over the next 10 years and estimate it to be nearly as important as relations with the US.⁷⁸³
- ❖ Nigerians identify China's trade policies as more fair to recipient states than US trade policies (88% positive vs. 87%, respectively).⁷⁸⁴

However, the following may reverse the positive trend.

- ❖ Consumers consistently report on the low quality of Chinese goods.⁷⁸⁵
- ❖ Heavily weakened domestic textile industry due to inexpensive Chinese textile imports negatively impacts employment and overall perceptions of Chinese activity.⁷⁸⁶
- ❖ The potential intensification of violence against and kidnapping of Chinese nationals, particularly from rural, oil producing regions as Chinese investment in mineral extraction in rural areas expands^{787 788 789} may lead to negative perceptions of China in Nigeria among the broader population.
- ❖ Continued abuses by Chinese managers of Nigerian personnel may aggravate anti-Chinese sentiment.⁷⁹⁰
- ❖ Nigerian trade unions estimate that 350,000 jobs have been lost to Chinese imports. Continued losses directly attributed to Chinese activity will contribute to negative social perceptions.⁷⁹¹

Analytic Notes

Source Reliability: Medium

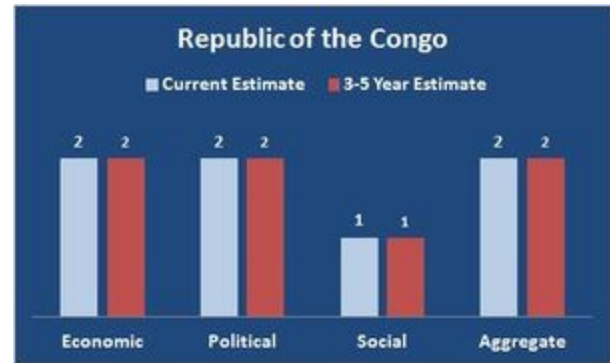
Analytic Confidence: Medium

Republic of the Congo

It is likely that overall Republic of the Congo (Congo) views of Chinese activities in their country will remain positive over the next three to five years.

Economic

It is likely that Congolese businessmen's view of China will remain strongly positive over the next three to five years due to huge Chinese investment.



- ❖ Chinese Foreign Direct Investment in Congo increased drastically from less than USD1 million in 2004 to over USD34 million in 2010.⁷⁹²
- ❖ Exports to China are increasing and there is an over USD4 billion trade surplus.⁷⁹³
- ❖ Congo is setting up four economic zones where Beijing's Trade Ministry will finance projects.⁷⁹⁴
- ❖ China financed and built a hydro power plant which produces 876 kilowatt-hours per year, freeing Congo from having to import energy.⁷⁹⁵
- ❖ A Chinese firm is investing USD15 million over four years for access to a forest in northern Congo.⁷⁹⁶
- ❖ The National Petroleum Company of the Congo has partnered with China for an open sea permit and is exploring resources. Chinese companies built the company's headquarters and two other office buildings.⁷⁹⁷
- ❖ By importing cheap Chinese goods, Congo does not have to import from its neighbors and can save 7 to 45%.⁷⁹⁸

However, as with many other African countries, Congo will have problems diversifying its economy if it continues to export raw materials and import cheap Chinese goods.⁷⁹⁹

Political

It is likely that Congolese politicians' strongly positive view of China will continue over the next three to five years due to a desire to keep China as an economic partner.

- ❖ Congo and China have enjoyed historically strong ties. Chinese Premier Wen Jiabao visited Congo in June 2006⁸⁰⁰ and Congolese President Denis Sassou-Nguesso visited Beijing on 26 September 2008 to sign deals on road construction and electricity transportation.⁸⁰¹
- ❖ Congo and China recently pledged deeper cooperation.^{802 803}
- ❖ Sassou-Nguesso is drawn to Chinese deals because there are no preconditions like good governance and respect for human rights.⁸⁰⁴
- ❖ France is moving away from being a traditional partner of Congo and China is widely considered to be filling the gap.⁸⁰⁵
- ❖ The government has issued most 2012 contracts for fiber-optic cable installation, dam construction, and new roads to Chinese companies.⁸⁰⁶
- ❖ The Congolese government has expressed good will toward the Chinese people
- ❖ When six Chinese workers were killed in an ammunition depot explosion in Brazzaville in March 2009, Sassou-Nguesso visited the victims and pledged full support to protect Chinese workers.⁸⁰⁷
- ❖ Congo donated USD2.51 million to rebuild a school in Tibet destroyed by an earthquake in 2010.⁸⁰⁸

However, the president faces criticism of using Chinese aid to further his own agenda

- ❖ Critics of China's investment say President Denis Sassou-Nguesso is using investment to become a “developmental authoritarian”.⁸⁰⁹

Social

It is likely that Congolese citizens' weakly positive view of China will continue over the next three to five years due to positive projects and investments.

- ❖ On 4 September 2012, Congo and China signed a USD1.225 billion deal to rebuild Brazzaville after the munitions explosion.⁸¹⁰
- ❖ The four year forestry deal will create over 300 jobs.⁸¹¹ China Daily, a state-controlled newspaper, touted the benefits of investing in Congolese plantations in the north that could hire 20,000, which may indicate China is willing to invest in agriculture.⁸¹²
- ❖ In September 2012, Chinese engineers linked the capitals of the two Congos with fiber optic cable, allowing citizens wider access to e-services.⁸¹³
- ❖ For the 2012-2013 school year, China awarded 38 students from Congo with scholarships to study in China.⁸¹⁴

However, there have been several cases of ivory smuggling that could harm China's image

- ❖ Since January 2010, there have been at least three instances of Chinese people smuggling ivory out of the country. In all cases the perpetrators were arrested and held by law enforcement.^{815 816 817}

Analytic Notes

Source Reliability: Low

Analytic Confidence: Medium

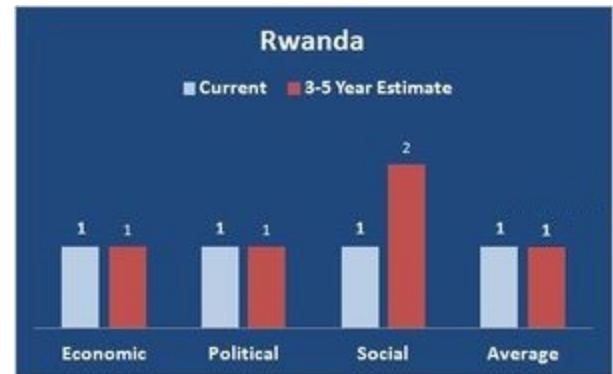
Rwanda

It is likely that the overall perception of Rwanda toward Chinese activities will be weakly positive over the next three to five years, with political, economic and social perceptions trending upward.

Economic

Weak positive perceptions are likely increasing and leading to sustained weak positive business perceptions in three to five years. Key supporting facts include:

- ❖ Since 1971, Chinese grants to Rwanda total USD170 million. After 2004, the total grant amount is approximately USD115 million with 39 projects across Rwanda. Moreover, trade between the two countries doubled to USD76.4 million in the first half of 2011 compared with the same period of 2010. It is estimated that about 4,700 items from Rwanda have reached the Chinese market.⁸¹⁸ Approximately 13.5% of Rwanda's total exports go to China.⁸¹⁹
- ❖ The Chinese approach is to expand their focus to Rwanda beyond Official Development Aid (ODA) by encouraging cultural and social relations between the people of the two countries where they will be coming to train each other in different fields on the ground.⁸²⁰
- ❖ Furthermore, there are currently over 20 Chinese companies in Rwanda, operating in the fields of construction, service, tourism, mining and resource development. The Chinese are becoming more and more interested in investing in Rwandan companies and expanding their influence.⁸²¹



Political

Weak positive political perceptions are likely to remain weakly positive over the next three to five years.

- ❖ China and Rwanda recently agreed to strengthen bilateral relations after 40 years of cooperation.⁸²²
- ❖ The length of political relations between the countries illustrates the strength of bilateral cooperation and observing that the Chinese government will continue supporting the development of Rwanda.⁸²³
- ❖ China and Rwanda have also worked closely over the past 40 years to establish a stronger trade relationship. The amount of grants and institutional aid coming from China has also been remarkable.⁸²⁴

Social

Weak positive social perceptions are likely to remain strongly positive over the next three to five years. Key supporting facts include:

- ❖ Rwandans are working on strengthening relations in support of China in many areas, especially on the One-China policy.⁸²⁵
- ❖ The Rwandan people strongly believe that they will not rely on foreign aid but rather attract foreign investment. Because of this, China has focused largely on the national development of Rwanda through investment, rather than providing them directly with aid.⁸²⁶

- ❖ Due to the integration of the Chinese in Rwanda, both sides have utilized the cultural exchange to their advantage. Both Rwandans and Chinese have learned from each other in language and cultural aspects.⁸²⁷
- ❖ The Confucius Institute of Chinese language was recently launched at the Kigali Institute of Education in Rwanda. Its aim was to promote the Chinese language and culture, as well as mutual development, exchanges, and academic collaborations between China and Rwanda.⁸²⁸
- ❖ An article written on the Rwanda-China embassy organization website describes the friendship between Rwanda and China as "a love between two hearts." Furthermore, 40 years of bilateral relations are a sign of not only friendship, but a strong brotherhood.⁸²⁹
- ❖ The establishment of a Chinese Confucius Center, meant to develop stronger social and cultural ties, also bodes well for future social perceptions in Rwanda.⁸³⁰
- ❖ China has furthered their support by spreading it to individual schools such as the Inyange Girls School of Sciences. One teacher from that school in particular expressed her gratitude to the Chinese for building their school and supplying them with computer labs and books among other things.⁸³¹
- ❖ "The best performing students in the school will be sponsored to study in the universities in China. 'We are really proud of the Rwanda-China cooperation,' the head teacher said.⁸³²

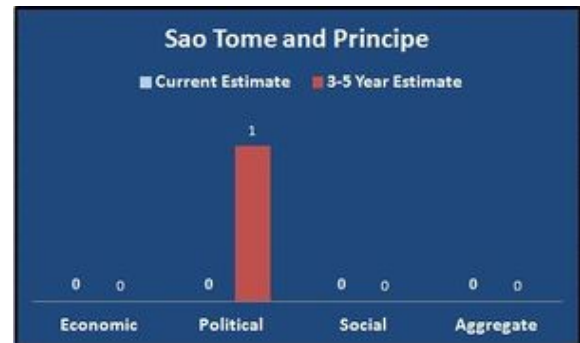
Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Sao Tome and Principe

It is likely that Sao Tome and Principe will have an overall weakly positive view of Chinese activities in the next three to five years, primarily due to weakly increasing perceptions of Sao Tomean politicians.



Economic

Owing to minimal interaction between Sao Tomean businesses and the Chinese, it remains likely that Sao Tomean businesses will continue to view Chinese activities neutrally for the next three to five years. However, the recent Chinese purchase of oil rights off Sao Tome and Principe's coast may increase cooperation and sentiment.^{833 834}

Political Narrative Report

Although Sao Tome and Principe officially recognizes Taiwan, it is likely that the divided political sentiments toward Chinese activities will remain divided over the next three to five years. With the election of President Manuel Pinto da Costa in 2011, old relationships with China have been rekindled due to President da Costa's historical ties to mainland China. Additionally, President da Costa's socialist party has continued to increase their control of parliamentary seats but has been unable to hold the majority since 2002. As such, the Prime Minister is a member of the opposition party and staunch supporter of Taiwan, contributing to the divided sentiments toward Chinese activities.



President Manuel Pinto da Costa

On 25 December 1975, President Manuel Pinto da Costa boarded a plane in Beijing and concluded his official state visit in China. Before leaving, he gave a farewell address noting that "The conversations I have had the opportunity to hold with Chinese leaders, Chairman Mao Tsetung [Zedong] and Vice-Premier Li Hsien-nien, fully confirm the hopes and sentiments which caused me to effect this voyage, which is unforgettable for us. The contacts between our two delegations have enabled us to deepen mutual understanding of our problems and at the same time cement the ties of solidarity existing between us."⁸³⁵

Manuel Pinto da Costa and his ruling socialist party remained in control of Sao Tome and Principe until 1991 when multiparty elections were held.⁸³⁶ In 1997, Sao Tomean President Miguel Troboada officially recognized China over Taiwan, a move da Costa strongly opposed.⁸³⁷ However, in August 2011, Manuel Pinto da Costa was once again elected President. Although officially running as an independent, he has retained strong ties to the Movement for the Liberation of Sao



Prime Minister Patrice Trovoada

Tome and Principe (MLTSP) Socialist Party, the former ruling party during his time as President between 1975 and 1991.⁸³⁸ In the 2010 parliamentary elections, the MLTSP won 21 out of 55 seats, maintaining their position as a vocal minority.⁸³⁹

Of note, during da Costa's inauguration in September 2011, a Chinese delegation was reportedly in attendance.⁸⁴⁰ Additionally, in April 2012, reports appeared suggesting Sao Tome and Principe sent a delegation to the Macau Forum, a Chinese hosted economic and trade forum for Portuguese speaking countries.^{841 842} In 2012, the Macau Forum provided USD200 million to Portuguese speaking countries, the first installment of USD1 billion promised by Chinese President Hu Jintao, a potentially untapped resource for Sao Tomean politicians for development aid.⁸⁴³ Sao Tome and Principe has not officially refuted the allegation that they sent a delegation, although Taiwanese officials, citing Sao Tomean officials, did deny the claims, but said they could not confirm that a private Sao Tomean delegation may have attended.⁸⁴⁴ Days after these reports appeared, Taiwanese President Ma cancelled an official state trip to Sao Tome and Principe, citing scheduling problems between President Ma and President da Costa. However, experts have noted that state visits are highly scripted and it is highly unlikely that President da Costa suddenly left the country, as Taiwan claimed.⁸⁴⁵ Two weeks later on 24 April 2012, Sao Tomean officials announced that President da Costa declined an invitation to attend President Ma's inauguration in May 2012.⁸⁴⁶

Although President Pinto da Costa and his MLTSP Party appear highly inclined toward China, it should be noted that the government is not unified. Patrice Trovoada, son of former President Miguel Trovoada who changed diplomatic recognition from China to Taiwan in 1997, is currently the Prime Minister of Sao Tome and Principe.⁸⁴⁷ Additionally, Trovoada's Independent Democratic Action (ADI) Party holds 26 out of 55 parliamentary seats, the largest number held by a single party although still not a majority.⁸⁴⁸ In September 2012, Parliamentary Speaker and ADI party leader Evaristo Carvalho lead a delegation to Taiwan that met with President Ma to express gratitude for Taiwan's continued assistance.⁸⁴⁹ Finally, many within the Sao Tomean government are unwilling to risk damaging Taiwanese aid to the country, totaling approximately USD15 million a year.⁸⁵⁰

Social

The lack of interaction between Sao Tomeans and Chinese indicates it is likely that Sao Tomean citizens will continue to hold a neutral view of Chinese activities for the next three to five years.

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Senegal

It is likely that the overall perception of Senegal toward Chinese activities will remain weakly positive over the, with social perceptions trending weakly negative due to economic issues within the country.

Economic

Strong positive perceptions of Chinese activities are likely to remain strongly positive over the next three to five years. Key supporting facts include:

- ❖ There has been steady progress between the countries' trade relationship. Chinese investment in Senegalese infrastructure has also strengthened ties.⁸⁵¹
- ❖ China has supported the Senegalese government with grant aid for agriculture and donated money and drugs to provide treatment for over 400,000 Senegalese people.⁸⁵²
- ❖ China also has a number of projects working out of Senegal to generate business and work with the Senegalese people.⁸⁵³
- ❖ China has planned the construction of a museum and a number of football stadiums throughout the country. This will not only increase employment but overall revenue in Senegal. These projects are purportedly geared toward benefiting the country as a whole, not just the elites.⁸⁵⁴
- ❖ Recently in 2009, about 30 Chinese company executives discussed business opportunities with Senegalese businessmen from the public and private sectors to improve economic relations between the two countries. They wanted to explore diverse fields such as telecommunications, construction industry, mining industry, agricultural sector and handicraft industry.⁸⁵⁵

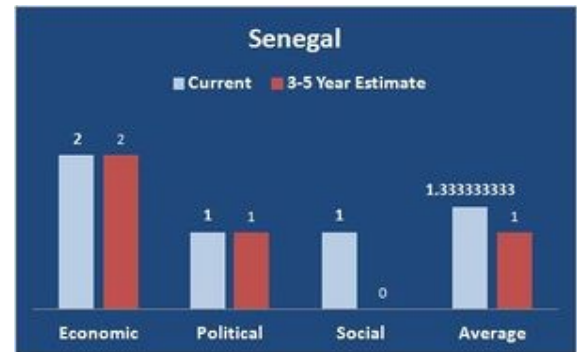
Although largely positive, trade relations have the potential to damage views.

- ❖ China supplied Senegal with 94% of their imports in 2006. Although this is a significant amount, the imbalance of trade is leaving Senegal with a low GDP and high unemployment.⁸⁵⁶
- ❖ Local Senegalese businessmen who make their own products are very concerned with the competition coming from cheap, non-durable Chinese products that have been created with plastic, rather than leather and sold for a fourth of the price.⁸⁵⁷

Political

Weak positive political perceptions of Chinese activities are likely to remain weakly positive in the next three to five years. Supporting arguments include:

- ❖ China and Senegal have agreed to strengthen bilateral ties.⁸⁵⁸
- ❖ Positive progress was made in mutually beneficial cooperation in infrastructure, fishery and telecommunication.⁸⁵⁹
- ❖ In January, Minister of the International Department of the CPC Central Committee Wang Jiarui visited Senegal. He held talks with the head of the Democratic Party of Senegal. Both sides reached a consensus on further strengthening inter-party exchanges and cooperation to consolidate the political foundation of their bilateral relations.⁸⁶⁰
- ❖ In 2011, China discussed its willingness to continue working with Senegal for further bilateral cooperation to benefit the people of both countries. Prime Minister Ndiaye of Senegal also expressed his country's gratitude for China's social and economic support.⁸⁶¹

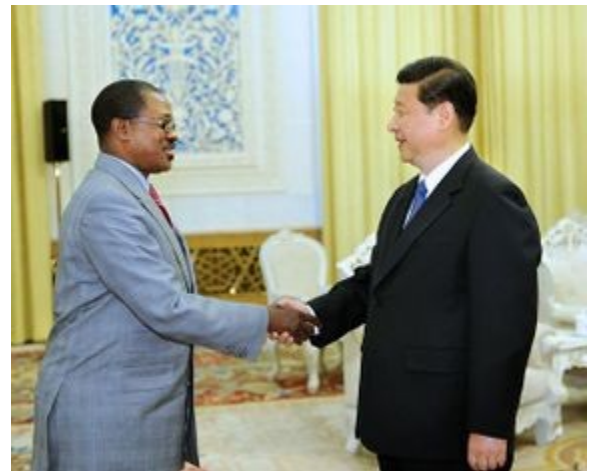


Social Narrative Report

It is likely that the overall popular perception of Senegal toward Chinese activities in Senegal will be weakly positive in the next three to five years. This popular perception is a direct result of inexpensive Chinese imports and increased employment in the country. Ultimately, these low priced goods benefit both consumers and small itinerant vendors looking to re-sell Chinese imports. Furthermore, interaction between Chinese and Senegalese workers has led to increased integration between both cultures. Despite this, some Senegalese consumers believe there is a chance of social unrest if Chinese immigration is not regulated and controlled in the very near future.

Senegal has experienced Chinese immigration since the 1980's.⁸⁶² Since renewed diplomatic relations between the two countries in 2005, China has been acting as a donor country for Senegal, relying on them for diplomatic cooperation. Chinese FDI in Senegal has been relatively insignificant since resumption of diplomatic relations mainly because of the lack of natural resources in Senegal. Despite this, one of China's state-owned enterprises, the China National Fisheries Association (CNFC), has invested in two Senegalese subsidiaries, Senegal Pêche and Sénégal Armement.⁸⁶³

The Chinese have also financed a number of infrastructure projects and provided Senegal with interest-free loans and grant aid.⁸⁶⁴ In January 2009, the Chinese company King Long Automotive Industry Co. Ltd. and the Senegalese company Senebus Industrie SA set up a joint venture with the aim of improving the local public transport system. Also, the China Henan International Cooperation Group (CHICO) has been working on expanding and transforming inner city infrastructure since 2007. The project includes the building and reconstruction of roads and the expansion of electricity and water supply systems.⁸⁶⁵



Chinese Vice President Xi Jinping (R) shakes hands with Senegalese State Minister of Foreign Affairs Madicke Niang in Beijing

The most prominent benefit however is not from aid or infrastructure projects, but from cheap Chinese imports. Many young Senegalese workers have found opportunities to start their own small businesses on the basis of cheap Chinese goods. Of these workers, some have gone door to door selling their products at slightly higher prices to make a small profit and further their businesses.⁸⁶⁶ Furthermore, because many basic goods are now within reach of Senegalese citizens for the first time, consumers are determined to keep prices lower. The Chinese also bring employment, noting that most shops employ a number of Senegalese people and reportedly pay up to a third more than the minimum wage.⁸⁶⁷

Despite these positive popular perceptions across the board, there are a few factors that could lead to weak negative views toward Chinese activities in Senegal. Soumboul Sylla, who was involved in trade with Dubai and the UAE before China came along believes that “the activities of Chinese traders in Senegal should be better regulated as these activities ‘represent a threat’ to the national economy and to those local large firms which rely on imports.” Sylla believes

Senegalese businesses should have preference because, “while the Chinese traders bring in petty, valueless items and accessories, the Senegalese importers bring in the more important goods, such as furniture and bedroom suites.” This perception of some Senegalese could have a negative impact on Chinese-Senegalese relations.⁸⁶⁸

Analytic Notes

Analytic Confidence: Medium

Source Reliability: Medium

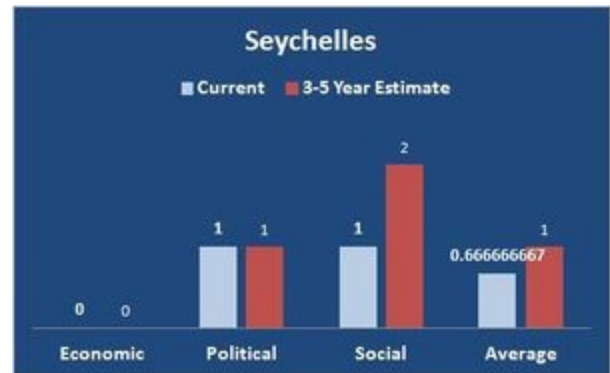
Seychelles

It is likely that the overall perception of Seychelles toward China will be weakly positive over the next three to five years, with strengthened diplomatic relations and social exchanges.

Economic

Neutral business perceptions are likely to remain neutral over the next three to five years.

- ❖ China has pledged economic aid to Seychelles worth USD6 million for development projects.⁸⁶⁹
- ❖ In 2011, Seychelles and China signed an agreement on economic and technological cooperation stating that the Chinese government will continue to provide aid to Seychelles that will go toward projects agreed upon by both governments.⁸⁷⁰
- ❖ China is one of Seychelles' significant trade partners, importing goods such as equipment, machinery, foods, and petroleum.⁸⁷¹



Political

Weak positive political perceptions are likely to remain weakly positive over the next three to five years. Key supporting arguments include:

- ❖ Diplomatic relations between China and Seychelles were established in 1976.⁸⁷²
- ❖ In 2011, Chinese Vice President Xi Jinping met with Seychellois President James Alix Michel in Beijing. There they discussed mutual appreciation for enhanced political trust and mutual support on major issues concerning each other's core interests.⁸⁷³
- ❖ President Michel said Seychelles and China maintain friendly relations and visit frequently to discuss bilateral cooperation in politics, trade, economy and other fields.⁸⁷⁴ The exchanges of visits between leaders of the two countries have helped them reach broad consensus and promoted bilateral cooperation in all fields, he said.⁸⁷⁵

Social

Weak positive popular perceptions are likely to increase leading to strong positive perceptions over the next three to five years. Supporting facts include:

- ❖ Minister of Seychelles Vincent Mariton said China continues to play a significant role in supporting the overall socio-economic development of Seychelles.⁸⁷⁶
- ❖ During President Michel's visit to Shanghai, Seychelles students highlighted the fact that "studying at Chinese institutions allowed them to have access to a high level education while also being able to get a unique insight into one of the most powerful economies in the world."⁸⁷⁷

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Sierra Leone

Perceptions of Chinese activities in Sierra Leone are likely to improve in all three sectors. Business perceptions are currently neutral, while perceptions among the political elite and populace are currently positive. Growing interest in Sierra Leone's natural resources on the part of China is the major factor leading to increased interaction.

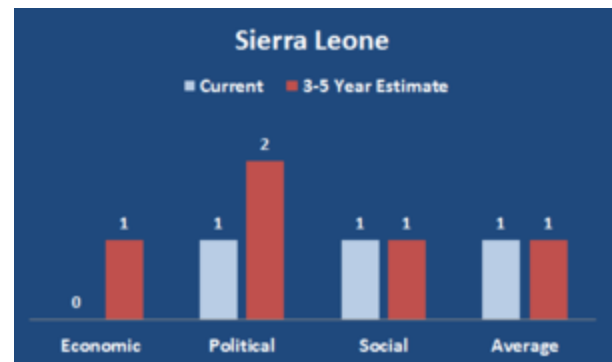
Economic

Business perceptions of Chinese activities in Sierra Leone is neutral and likely to improve slightly over the next three to five years due to low levels of Chinese business presence but increasing Chinese interest in the country.

- ❖ China recently completed a deal with British owned African Minerals, which has substantial iron ore operations in Sierra Leone, guarantees a continuous supply of African Minerals' Sierra Leone iron production to China.⁸⁷⁸
- ❖ Shandong Iron and Steel purchased a 25% stake in an iron mine in Sierra Leone in 2010, further indicated increasing interest in Sierra Leone's substantial iron deposits.⁸⁷⁹
- ❖ The specification of a recent Memorandum of Understanding which specifies knowledge transfer in future Chinese development projects in Sierra Leone⁸⁸⁰ will positively affect domestic capabilities and encourage domestic construction of future infrastructure projects.

However, tensions between other foreign mineral extraction companies in Sierra Leone may contribute a negative association with future Chinese business ventures in Sierra Leone and damage business perceptions of Chinese activity.

- ❖ Strikes at an African Minerals mine over wages in 2012 led to riots and the death of a bystander and negative perceptions of the company.⁸⁸¹



Political

Positive perceptions of Chinese activity in Sierra Leone among the political elite are likely to improve over the next three to five years owing to aid and development projects led by the Chinese.

- ❖ Sierra Leone's ambassador to China reportedly stated the following in 2007 regarding Chinese vs. Western aid packages: "If a G8 country had wanted to build the stadium we would still be holding consultations. The Chinese, however, simply come and do it. They don't need any meetings to investigate the possible effects on the environment, human rights, or good and bad governance. I'm not saying that it's correct, but only that China's approach is successful as a result."⁸⁸²
- ❖ As a recent example of Chinese infrastructure development, China has initially agreed to finance and construct a new airport terminal for Freetown, Sierra Leone's capital.^{883 884}
- ❖ In September 2012, Sierra Leone and China signed a Memorandum of Understanding (MoU) which stipulates increased technology transfer involving Chinese led infrastructure projects.⁸⁸⁵ Additionally the MoU designates China Railway Construction Corporation and China International Fund Limited as prime contractors for future infrastructure project construction and funding.^{886 887}

Social

Weakly positive perceptions of Chinese activities in Sierra Leone are likely to slightly improve over the next three to five years due to increasing social aid programs that positively affect perceptions.

- ❖ In 2011, China completed construction on several rural schools in Sierra Leone;⁸⁸⁸ the opening of the schools in previously semi-isolated communities will positively impact popular perceptions.
- ❖ Additionally, China sent 30 volunteers to Sierra Leone in 2011 in a pilot international volunteer program modeled on the US Peace Corps. The volunteers ranged in their placement and purpose.⁸⁸⁹
- ❖ The Confucius Institute opened in 2012 provides Chinese language instruction and facilitates cultural exchanges.⁸⁹⁰
- ❖ A hospital funded and constructed by China in 2011 outside Freetown improves urban medical access.^{891 892} China additionally provided a Sierra Leone with a tranche of anti-Lassa Fever medication.⁸⁹³

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Somalia

It is likely that the overall perception of Somalia toward Chinese activities will be weakly positive over the next three to five years, with strengthened diplomatic ties and trade relations.

Economic

Neutral perceptions will likely have an upward trend over the next three to five years. Supporting facts include:

- ❖ In 2007, the Chinese corporation CNOOC was granted legal permission from Somalia to excavate for oil. This illustrates China's desperate need for alternative energy sources and its willingness to risk security for energy, since Somalia has a long history of political instability.⁸⁹⁴
- ❖ Although oil reserves have not currently been located in Somalia, Range Resources, a small Australian-based oil firm, estimates that the region could hold 5 billion to 10 billion barrels of oil based on an analysis of previous exploration reports. This forecast has successfully caught the attention of Chinese corporations.⁸⁹⁵
- ❖ Although Somalia has been embroiled in civil war mainly in its south central region for the past two decades, the government says trade within and outside the country is doing well and considers China to be its main trading partner in the world.⁸⁹⁶
- ❖ The strength of Somalia's trade with China is very visible in most Somali markets where almost all the construction materials, electronics, telecommunications equipment and textiles are imported from China.⁸⁹⁷

Although the Somali minister of trade acknowledged that trade with China was largely "one way," he was optimistic that export from Somalia to China could grow, urging the bettering of the relationship between the two countries.⁸⁹⁸

Political

Positive perceptions will likely remain stagnant over the next three to five years. Key facts include:

- ❖ Somalia and China first established diplomatic relations in 1960, but the two countries have been in contact since well before medieval times.⁸⁹⁹
- ❖ In December 2010, President Hu Jintao exchanged congratulatory letters with President Sheikh Sharif Sheikh Ahmed on the 50th anniversary of the establishment of diplomatic ties between the two countries.⁹⁰⁰
- ❖ Since their establishment in 1960, the countries have maintained a relatively close relationship in regards to international affairs. China supported the United Nations Security Council resolution to extend the mandate of the AU Mission in Somalia and called for greater international attention to the Somali issue.⁹⁰¹
- ❖ China began to send escort fleets to the Gulf of Aden and the Somali waters at the end of 2008. By the end of 2010, seven escort fleets were stationed in the concerned areas.⁹⁰²

Social

Positive perceptions are likely to remain weakly positive over the next three to five years. Key facts include:

- ❖ "We prefer the Chinese goods over the others because of two main aspects: that is quality and price," said Omar Abdi, a shopper in Mogadishu's main Bakara market, the largest in Somalia.⁹⁰³

Analytic Notes

Source Reliability: Medium

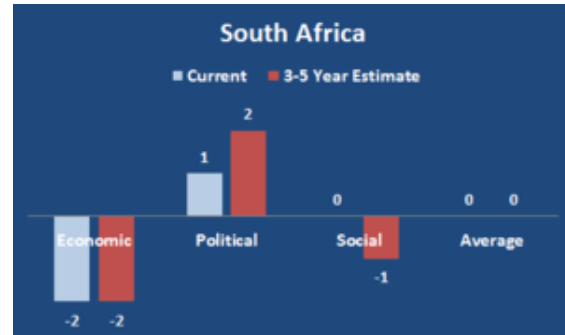
Analytic Confidence: Medium

South Africa

There are divergent perceptions of Chinese activity in South Africa (SA). While political elites' positive view of Chinese activity is likely to improve with a weak upward trend over the next three to five years, currently divided popular perceptions are likely to decline at a weak downward trend and negative business perceptions are likely to decline with a strong negative trend.

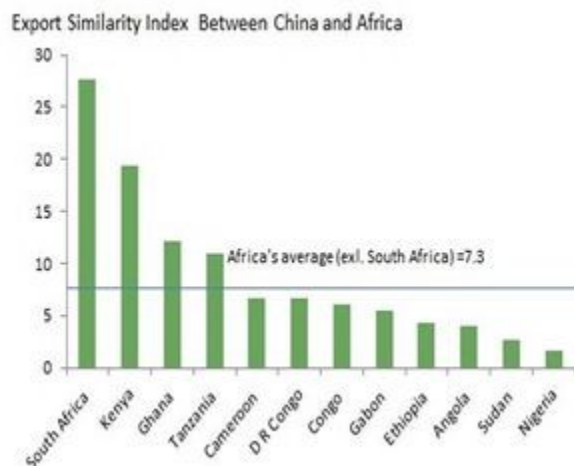
Economic Narrative Report

Business perceptions of Chinese activity in South Africa are highly negative and highly likely to continue declining over the next three to five years. While South Africa has more investment in China than vice versa, rising imports from China threaten domestic producers. Value added, manufacturing industries have been particularly impacted by Chinese imports that have lost market shares on both the domestic market and export markets in Sub-Saharan Africa.



Conversely, rising exports to China, though largely composed of commodities, benefits South African business. Additionally, the recognition of the unbalanced benefit to China in Sino-South African trade by politicians may lead to efforts to curb China's negative impacts on South African business.

China has been South Africa's largest trading partner since 2008,⁹⁰⁴ however the bulk of South African exports to China is in commodities and goods with little value-added.⁹⁰⁵ Conversely, Chinese imports are made up of manufactured goods, textiles, machinery and other value-added goods.^{906 907} Largely, inexpensive Chinese imports negatively impacted South African producers⁹⁰⁸ that must contend with higher production costs and labor.⁹⁰⁹



According to the School of International Development at the University of East Anglia in the UK, Chinese business activities have not only affected South African business sales on the domestic market but also contribute to losses on export markets throughout Sub-Saharan Africa. The School of International Development estimates that 75% of the market penetration by Chinese goods and businesses in South Africa since 2001 has negatively affected domestic producers.⁹¹⁰ Additionally, the top ten Chinese exports to Sub-Saharan Africa and South Africa (i.e. textiles, furniture, electronics, machinery, etc.) were all industry areas in which South Africa had comparative advantage on both the domestic market and other Sub-Saharan African markets.⁹¹¹

The manager of SA windshield manufacturer National Auto Glass notes the effect of China's imports on SA industries, "[I] can't understand all the fuss government is making over the arrival

of Wal-Mart in SA. The Chinese are already here and they have devastated the manufacturing sector. The de-industrialization of SA is gathering pace and manufacturing operations are going to close, never to open again.”⁹¹² The expansion multi-national retailers like Wal-Mart selling Chinese products may expand negative perceptions to domestic retailers.

However, the large Chinese market holds potential for larger South African companies and may offset a minimal amount of negative perceptions among SA businesses. SABMiller, a South African brewing company expects 45% of its growth in 2013-2014 will come from the recently penetrated Chinese market,⁹¹³ despite recent drops in Chinese based sales.⁹¹⁴

South African politicians have taken note of business complaints against Chinese imports. President Zuma, at a summit with Chinese leaders, openly acknowledged China’s advantage in trade in both South Africa and Africa as a whole, calling the dependency on mineral and commodity exports “unsustainable.”^{915 916} A Memorandum of Understanding signed in 2012 at the South African Expos in Beijing will promote South Africa’s finished goods on the Chinese market to level out the composition of trade.⁹¹⁷

Political

It is likely that the positive perception of Chinese activities in South Africa among South African political elites will continue to improve over the next three to five years due to the following factors.

- ❖ President Zuma continues to encourage Chinese investment and FDI into the SA economy, including manufacturing, infrastructure, and mining industries.⁹¹⁸
- ❖ July 2012 meeting between Chinese and SA delegations resulted in commitments to expand the strategic partnership between the two countries.⁹¹⁹
- ❖ Established ties between the Chinese Communist Party and the ruling African National Congress party.^{920 921}
- ❖ Both states are members of the BRICS emerging economies group and are inclined to pursue mutually beneficial agreements.⁹²²
- ❖ Despite reservations within the SA business community regarding Chinese manufactured goods imports, SA substantial manufacturing industry and labor unions are better equipped to withstand Chinese competition than other Sub-Saharan African states.⁹²³

However, the following may negatively affect positive perceptions among South African political elites.

- ❖ President Zuma and other political elites have acknowledged the relative gains China receives from trade with SSA and are pursuing balanced trade agreements that protect manufacturing.⁹²⁴

Social

Divided perceptions decline to weak negative

Public perceptions of Chinese activities in South Africa are divided and likely to decline over the next three to five years.

- ❖ There is an historical Chinese-South African population, estimated to total 250,000-350,000.^{925 926}
- ❖ Urban employment has been negatively affected by Chinese imports competing with domestic manufacturing, particularly in labor intensive industries.^{927 928}
- ❖ Only 37% of South Africans have a “somewhat positive” or “very positive” perception of China, the lowest among 10 SSA states polled by Pew (2008-2011).⁹²⁹
- ❖ South Africa’s high democracy status suggests lower perceptions of Chinese activities in Africa.^{930 931}

However, the following may reverse the negative trend.

- ❖ Strong labor unions relative to other Sub-Saharan African states labor organization have been more successful in regulating workspace conditions and wages.⁹³²
- ❖ 53% of South Africans perceive China as a partner country (2008).⁹³³
- ❖ 56% of South Africans believe the growth of China’s economy is beneficial for their country (2008).⁹³⁴

Analytic Notes

Source Confidence: High

Analytic Confidence: Medium

South Sudan

It is likely that over the next three to five years South Sudanese perceptions of Chinese activities will increase and be weakly positive overall, with business and political perceptions growing positively and social views remaining weakly negative.

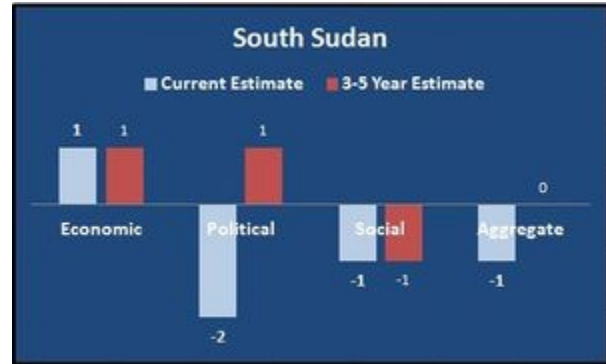
Economic

South Sudanese businesses' positive view of Chinese activities is likely to remain positive for the coming three to five years, due in large part to encouraging infrastructure development agreements and cooperation within the oil industry. Key facts supporting this positive view consist of:

- ❖ The largest oil fields are operated by Dar Petroleum, a Chinese, Malaysian, and South Sudanese consortium of oil companies.⁹³⁵ This cooperation in the largest oil consortium is a positive sign for business cooperation in the country, particularly in South Sudan where oil revenue supplies 98% of the government's revenue.⁹³⁶
- ❖ The Chinese government and state-owned Exim Bank have expressed willingness to provide low interest loans for development and infrastructure projects, specifically USD200 million in loans are being discussed from Exim Bank.^{937 938}
- ❖ Of particular importance to businesses large and small are road projects. China and South Sudan are currently discussing further road infrastructure plans for the near future.⁹³⁹ Details for a multi-billion dollar loan are still in negotiation but results are likely to be seen in the next 2 years.⁹⁴⁰
- ❖ Chinese traders are providing South Sudan cheap construction materials, electronics, and a wide range of consumer goods, often through local partners.⁹⁴¹
- ❖ Monday Kumba, a senior South Sudanese diplomat at the South Sudanese embassy in Beijing, in June 2012 expressed his gratitude to Chinese companies operating in many fields in South Sudan, including petroleum, telecommunications, and infrastructure, saying they have made important contributions to the economy.⁹⁴²
- ❖ Finally, businesses, like politicians are looking to China to help end conflict and disputes with Sudan, especially over vital oil fields.⁹⁴³

Clearly, not all business sectors view continued Chinese activities positively. Potential negative views are based around agricultural concerns.

- ❖ Although the current percentage of the agricultural sector in South Sudan is unknown, many experts note its vast potential.⁹⁴⁴ However, Chinese investments have been greatly limited and there appears little interest in Chinese investing in agriculture in South Sudan.⁹⁴⁵



Political Narrative Report

Although many South Sudanese politicians continue to harbor negative sentiments toward Chinese activities pre-independence and even more recently, it is likely that South Sudanese political sentiments will increase positively over the next three to five years. With the on-going economic and political situation in South Sudan continuing to remain poor, many South Sudanese have begun warming to, and indeed encouraging, China taking a larger role in maintaining stability. As the West, intentionally or otherwise, continues to play a less crucial role in South Sudan's development, many South Sudanese politicians are likely to view Chinese activities positively.

Many South Sudanese politicians continue to note China's support for Sudan during much of the past decade, often providing military equipment to a regime the South Sudanese consider corruption and violent. This support has tainted early South Sudanese sentiments toward China.^{946 947} Additionally, many South Sudanese politicians would prefer closer ties with the West.⁹⁴⁸ Increasingly, however, South Sudanese politicians are looking toward China as a key development and investment partner and are willing to leave the past behind.⁹⁴⁹

In particular, South Sudanese politicians view China as an important lever against Sudan to end the current conflict over oil revenues. As China has adjusted its policies from a Khartoum centered strategy to a more balanced approach, politicians in Juba have increasingly viewed China as a friend and potential ally.⁹⁵⁰ In particular, a flood of proposed construction



President Kiir meets with President Hu.

projects funded by China has assisted in creating positive political sentiments. China and South Sudan remain in talks concerning massive road construction projects which South Sudan has indicated is its top infrastructure priority.⁹⁵¹ In particular, a proposed road between Juba and Rumbek has already had a feasibility study conducted by a Chinese company and Chinese company Sinohydro began construction on a proposed road in Upper Nile prior to independence and is likely to continue in the near future.⁹⁵² South Sudanese particularly view China as an increasingly better option than Western aid. Faced with a financial recession, many Western donors have been unable or unwilling to provide the development aid South Sudan requires. China, however, with its no strings attached policy, has increasingly become a more positive option.^{953 954} With loans under negotiation from the Chinese Export-Import Bank worth USD200 million, it is increasingly likely that South Sudanese politicians will view Chinese activities positively over the next three to five years.^{955 956}

However, strong tensions still remain, causing negative views of South Sudanese politicians toward Chinese activities. These primarily relate to the oil industry and a perception of Chinese preferential treatment of Khartoum. For instance, in February 2012, South Sudanese officials expelled the head of the Chinese-Malaysian oil consortium, Petrodar, on the grounds of "non-cooperation."⁹⁵⁷ The South Sudanese government additionally accused Petrodar of illegally storing 40,000 barrels of oil a day, avoiding the usual taxes and expenses.⁹⁵⁸ South Sudanese officials are also wary of Chinese investment due to quality concerns. This is due in large part to widely acknowledged sub-standard rates of oil recovery associated with Chinese led oil firms.⁹⁵⁹

Finally, South Sudanese politicians note that “China is not a donor” in the traditional sense. Most of the loans previously provided have not been concessionary but based on resources-for-infrastructure schemes the Chinese commonly use in resource rich countries. Despite these negative sentiments, it remains likely that South Sudanese political perceptions of Chinese activities will become increasingly positive over the next three to five years.⁹⁶⁰

Social

South Sudanese are likely to maintain a negative view of Chinese activities, particularly rural individuals, over the next three to five years.

- ❖ Prior to independence, many South Sudanese saw China as a direct supporter of Sudan and “had underwritten an autocratic regime, helped facilitate the devastation and economic exploitation of the South, and aided in preserving the country’s fundamental center-periphery problem.”⁹⁶¹ Their views toward China remain tainted with this image.⁹⁶²
- ❖ Although many in the business and political sectors view China as powerful leverage against Sudan, social groups have recently warned China publicly against interfering in continued negotiations between Sudan and South Sudan.⁹⁶³ Many South Sudanese continue to view the Chinese as supporting conflict and disorganization rather than growth.⁹⁶⁴
- ❖ The Chinese lack of interest in developing South Sudan’s agricultural sector is also damaging to public views of China. Even worse, potential pushes to develop farm land for cash crops such as biofuels, oil palm, and sugar cane is concerning for many rural South Sudanese.⁹⁶⁵
- ❖ The South Sudanese view the Chinese communities in South Sudan as highly insular, with most Chinese businessmen and laborers concentrating primarily in Chinese establishments. The large numbers of Chinese in South Sudan have created large, often isolated, Chinese sectors.⁹⁶⁶
- ❖ Chinese aid additionally appears to have little effect on South Sudanese views. In fact, evidence suggests many non-elite South Sudanese view Chinese activities as solely benefiting the elites. A Chinese funded hospital, for instance, touted as a tremendous accomplishment by elites, is only accessible to elites with enough money to pay the Chinese run hospital.⁹⁶⁷ Additionally, while most Chinese aid is on hold until oil begins flowing again, social views are likely to remain low.
- ❖ Reports of South Sudanese small businesses also hindered by cheap Chinese goods and competition continue to rise.⁹⁶⁸ It is often noted that Chinese companies providing infrastructure construction use Chinese labor, not local labor.^{969 970}

Although the South Sudanese populace generally holds negative views, certain Chinese inroads have potential to create positive views.

- ❖ Chinese traders in South Sudan provide low cost construction materials, electronics, and a wide assortment of consumer products, increasing the purchasing power of many urban South Sudanese.⁹⁷¹
- ❖ Chinese companies have attempted to increase infrastructure projects to help local South Sudanese. A multimillion dollar Chinese plan to build new university campuses in South Sudan is currently on hold but retains the possibility of starting up in the next two years.⁹⁷²

Analytic Notes

Source Reliability: High

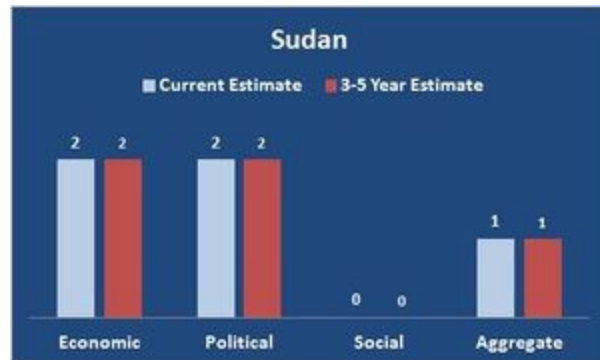
Analytic Confidence: Medium

Sudan

It is likely that the overall view of Sudanese toward Chinese activities in their country will remain weak positive over the next three to five years. Businessmen and politicians will continue to have a strong positive view, while citizens will have a divided view.

Economic

It is likely that Sudanese businessmen's strong positive view of China will remain strong positive over the next three to five years due to indications that China will continue to support the oil sector after the secession of South Sudan.



- ❖ When South Sudan seceded from Sudan on 9 July 2011, Sudan lost three-quarters of its oil reserves, which is the main driver of the Sudanese economy. China soon became highly interested in South Sudan and invested USD8 billion into South Sudan for infrastructure.⁹⁷³
- ❖ In January 2012, Sudan attempted to impose harsh transit fees on South Sudan's oil, which must pipe through Sudan to be exported. South Sudan responded by refusing to pump oil, limiting China's supply. In August 2012, China brokered a deal between the north and south that allowed oil to be exported again.^{974 975}
- ❖ In September 2012, China resumed importing oil from Sudan.⁹⁷⁶
- ❖ China has declined South Sudan's request to build a pipeline out of South Sudan.⁹⁷⁷ Such a pipeline would allow South Sudan's oil to bypass the north. Sudanese business likely favor China's decision as it allows them to maintain transit fees.
- ❖ Exports to China have risen so that there is a trade surplus of USD4.5 billion.⁹⁷⁸ China is Sudan's largest trading partner: 71% of Sudanese exports go to China, while Sudan receives 21% of its imports from China.⁹⁷⁹
- ❖ China has written off USD80 million in Sudanese debt and loaned USD13 million for infrastructure projects.⁹⁸⁰
- ❖ China's Shandong Group in September 2012 announced it will develop an area of 20 square kilometers for the cotton industry.^{981 982}

Political

It is likely that Sudanese politicians' strongly positive view of China will remain positive over the next three to five years due to Western isolation of Omar al-Bashir's government and China's continued engagement.

- ❖ Sudan was the second African country to establish relations with China in 1959. In the 1970s, Chinese people starting arriving with technology, infrastructure, and industry.⁹⁸³
- ❖ Omar al-Bashir, President of Sudan, summed up his government's position on China on 14 August 2009: "We believe that the Chinese expansion was natural because we filled the space left by Western governments, the United States, and international funding agencies, with China, Malaysia, India and other countries. The success of the Sudanese experiment in dealing with China without political conditions or pressures encouraged other African countries to look toward China."⁹⁸⁴
- ❖ China has repeatedly blocked United Nations sanctions on Sudan.^{985 986}

- ❖ China has apparently maintained military ties with Sudan after the South Sudan secession.⁹⁸⁷
- ❖ al-Bashir visited China on 27-30 June 2011 under a warrant from the International Criminal Court. China had accepted that Sudan would split and both sides affirmed ties. China's negligence to arrest al-Bashir drew criticism from the international community.⁹⁸⁸
- ❖ Sudan's Minister of Finance called for the funding and completion of Chinese projects in Sudan to speed up.⁹⁸⁹

Social

It is unlikely that the Sudanese people's divided view of China will change significantly over the next three to five years.

- ❖ Sudanese from the north that hold allegiance with the al-Bashir government have a positive view of China.
 - ❖ In a Gallup Poll conducted in June 2008, half of Sudanese expressed a favorable view of China, while one fourth expressed an unfavorable view.⁹⁹⁰ It is likely that the percentage holding a favorable view has gone up since the South's secession because many Southerners opposed to al-Bashir, and thus China's support of his regime, now live in South Sudan.
 - ❖ Sudanese support al-Bashir and rallied against his indictment, which was also criticized by China.⁹⁹¹
 - ❖ A Sudanese hip hop star said most Africans like Chinese because they do not question African policies like the West.⁹⁹²
- ❖ Sudanese from the South that hold allegiance with the South Sudanese government likely have a negative view of China.
 - ❖ Rebel groups have called for the overthrow of al-Bashir's regime⁹⁹³ and have kidnapped and killed Chinese workers because they construct roads that can be used by al-Bashir to transport troops and because China has blocked aid from reaching South Sudan.^{994 995 996}

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

Swaziland

Due primarily to a lack of interaction between China and Swaziland, it is likely that over the next three to five years Swazi views of Chinese activities remain neutral in all sub-groupings.

Economic

Despite tough competition for Swaziland's textile industry, it is likely that business views of Chinese activities will remain primarily neutral for the next three to five years. Key supporting arguments include:

- ❖ Swaziland, unlike many African countries where arrival of Chinese immigrants is a recent phenomenon, has been host to Chinese immigrants and businesses for several generations. These Chinese small businesses often fill gaps in the economy without competing with locals.⁹⁹⁷
- ❖ Although the Swazi textile industry faces tough competition from Chinese exports, the industry is not sizable enough in Swazi to create negative sentiments.^{998 999 1000}
- ❖ Further, as diplomatic ties have been severed, there is little to no Chinese FDI in Swaziland.¹⁰⁰¹

Certainly, however, trade factors and continued competition remain a likely point of contention for Swazi business views toward Chinese activities, and an increasing deficit is unlikely to help.¹⁰⁰²

Political

Due to a lack of diplomatic relations and overall interaction, it remains highly likely that the Swazi political elite will continue to view Chinese activities neutrally.

- ❖ Swaziland has kept diplomatic relations with Taiwan since 1970, thus it has no diplomatic ties with mainland China.¹⁰⁰³
- ❖ In 2011, Swaziland's Minister of Foreign Affairs said that the relationship between Swaziland and Taiwan is "a marriage that will not end in a divorce, even if mainland China were to approach the country."¹⁰⁰⁴
- ❖ Taiwan has provided over USD90 million in investments over the last four decades.¹⁰⁰⁵

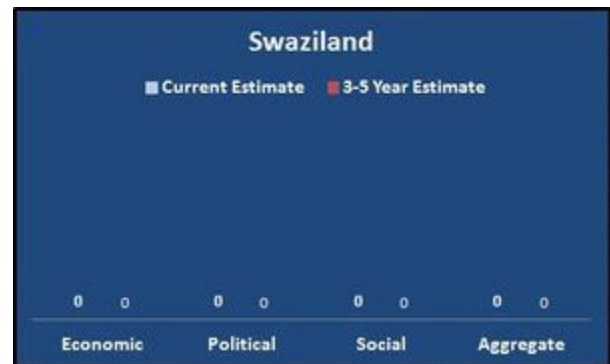
Social

It is likely that local Swazis will retain a neutral view of Chinese activities, primarily due to the lack of interaction with Chinese.

- ❖ Due to the lack of diplomatic ties, there currently are very few Chinese from the mainland in Swaziland. Numbers are estimated at around 300.¹⁰⁰⁶ Limited interaction is expected to continue as diplomatic relations continue with Taiwan.

However, it should be noted that many more Taiwanese reside in Swaziland and are often mistaken and lumped in as from mainland China. This distinction is often missed among local Swazis and may lead to negative views.

- ❖ Additionally, as Chinese competition in the textile industry expands, continued unemployment may be associated with this Chinese competition and foster negative views.¹⁰⁰⁷



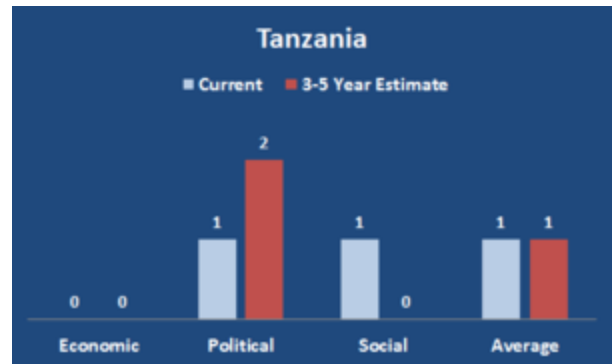
Analytic Notes

Source Reliability: High

Analytic Confidence: Medium

Tanzania

Over the next three to five years, positive perceptions of Chinese activity in Tanzania among the political elite are likely to remain positive. However, divided perceptions among the business community and slightly positive popular perceptions may negatively impact positive perceptions politically.



Economic

Business perceptions of Chinese activity in Tanzania are divided among large vs. small businesses and likely to remain divided so over the next three to five years. The following are factors which contribute to large business moderately positive perceptions of Chinese activities in Tanzania.

- ❖ Immense growth in exports to China that has reduced the trade imbalance between the two states, indicative of growing commodity, manufacturing, and services capabilities in Tanzania positively affects business perceptions.¹⁰⁰⁸ Additional increases in Chinese FDI in Tanzania from 1.62 in 2004 to 25.72 in 2010¹⁰⁰⁹ may contribute to beneficial perceptions among businesses which trade with China or use Chinese products for industrial inputs.
- ❖ A USD3 billion joint-venture in resource extraction between a Tanzanian and Chinese company indicates a more level playing field in extractive industries than seen in other SSA states among large Tanzanian businesses.¹⁰¹⁰
- ❖ Evidence of training programs for Tanzanian employees of Chinese companies that will improve Tanzanian capabilities in relevant industries.¹⁰¹¹
- ❖ A March 2012 Memorandum of Understanding (MoU) between the Tanzanian government and China Council for the Promotion of International Trade (CCPIT) encouraged Chinese investment in Tanzanian enterprises and commits the countries to enhanced trade between states with emphasis on Tanzanian export capabilities.¹⁰¹²

Factors which contribute to moderately negative perceptions of Chinese activities in Tanzania among smaller businesses are the following:

- ❖ The emphasis of negotiations at the federal level and concentration of power in the executive regarding international trade and investment negatively impacts entrepreneurialism and domestic economic growth.¹⁰¹³
- ❖ Chinese emphasis on trade over investment decreases opportunity of domestic producers to secure capital and improve comparative advantage in international markets.¹⁰¹⁴
- ❖ Conflicting consumer attitudes favoring inexpensive Chinese imports while decrying subpar “Made in China” products is indicative of increasing market presence of Chinese products and losses to domestic producers.¹⁰¹⁵

Political

Positive perceptions of the Tanzanian political elite toward Chinese involvement in Tanzania are likely to improve over the next three to five years.

- ❖ Tanzanian President Jakaya Kikwete is supportive of China's "no strings attached" aid policy and indifference toward a recipient state's political system or human rights.¹⁰¹⁶ Freedom House rated Tanzania as partly free in 2011.¹⁰¹⁷
- ❖ A 2012 Memorandum of Understanding pledges China and Tanzania to enhance trade relations and encourage Chinese business and investment in Tanzania.¹⁰¹⁸

- ❖ China has provided Tanzania with consistent Chinese aid and development programs in Tanzania since independence.¹⁰¹⁹
- ❖ Tanzania is one of China's largest foreign aid recipients in Africa.¹⁰²⁰
- ❖ Bilateral trade and Chinese FDI is highly likely to continue an upward trend as seen in previous five years.^{1021 1022}
- ❖ Current popular support of Chinese involvement in Tanzania legitimizes a pro-China policy,¹⁰²³ however the likely decline in popular perceptions may negatively impact political views.
- ❖ Partial government ownership of domestic extraction firm involved in USD3 billion joint venture with Chinese companies; this may encourage future government involvement in resource extraction agreements with foreign companies.¹⁰²⁴
- ❖ Centralized control of international business and trade agreements with little participation by domestic small-medium enterprises (SME) enhances government influence over trade and benefits from trade.¹⁰²⁵

However, political views of China may be negatively affected by the following.

- ❖ Public pressure in the wake of infrastructure project failures by Chinese firm negatively impacts the perceptions of Chinese business dedication to projects.¹⁰²⁶
- ❖ Pressure to ensure workers' rights for Tanzanian employees of Chinese firms is impacted by labor complaints.¹⁰²⁷
- ❖ Consumers often decry the low quality of imported Chinese goods,¹⁰²⁸ further government oversight may lead to declining political perceptions.
- ❖ Public perceptions that China is largely interested in uneven trade and does not intend to invest heavily into the Tanzanian economy¹⁰²⁹ may induce politicians to oversee Chinese investment more closely.

Social Narrative Report

It is likely that positive social perspectives among Tanzanians of Chinese activity in the country will decline over the next five years. While previous polls suggest overall positive perceptions, labor complaints among laborers for Chinese companies will negatively affect future perceptions. Additionally, popular perceptions that Chinese activities in Tanzania are focused on trade rather than investment indicate that Tanzanians as a whole do not perceive substantial gains to the population. Lastly, the inflows of Chinese imports which negatively affect domestic industry have been a point of contention among consumers who report low quality standards among the population. Conversely, cultural exchange programs and continued Chinese FDI into Tanzania may positively affect social perceptions.

A 2010 Afrobarometer poll of Tanzanians' perception of Chinese activities in their country shows a moderately positive position, 63% of Tanzanians responded that Chinese activities in their country "helped somewhat" or "helped a lot."¹⁰³⁰



Miners protested at this Barrick Gold mine.

Compared to earlier Pew Global Attitudes responses in 2008, there is a substantial drop in positive perceptions of China as a whole where 71% of respondents had a “very favorable” or “somewhat favorable” of China.¹⁰³¹

Contributing factors to declining perceptions largely are related to labor relations, the effect of Chinese imports on employment opportunities and the quality of such imports, and beliefs regarding Chinese motives for engaging in trade with Tanzania.

As in several other Sub-Saharan African states, there are tense labor relations. While there are regulations on labor and working conditions, Chinese companies operating in Tanzania have been accused of not following such regulations and restricting the legal organization of labor and the formation of unions.^{1032 1033} The inability to engage in collective bargaining in domestic labor, particularly in the textile, manufacturing, construction industries, noted in the China Quarterly report,¹⁰³⁴ will contribute to declining perceptions of Chinese activity in Tanzania among laborers. Additionally, the employment of expatriate Chinese laborers negatively impacts domestic perceptions of Chinese activity in Tanzania. The historical TAZARA railway between Tanzania and Zambia financed and led by China employed an estimated 50,000 Tanzanians and Zambians and 25,000 imported Chinese laborers.¹⁰³⁵

Chinese foreign direct investment has grown from USD1.62 million in 2004 to USD25.72 million in 2010,¹⁰³⁶ and the Chinese ambassador to Tanzania, Lu Youqing, states that “Chinese companies mainly focus on the manufacturing field, which takes up over 70% [of investments].”¹⁰³⁷ However, the Center for Chinese Studies at the University of Stellenbosch notes that the majority of participants of a 2009 study of Tanzanian-Chinese relations perceive that Chinese interaction is focused on trade over investment which benefits China more so than Tanzania.¹⁰³⁸

The perceived emphasis on trade over investment among Tanzanians is tied to popular perceptions of Chinese consumer goods that have replaced domestically-owned manufacturers. Tanzanian consumers have complained of dangerous, substandard Chinese imports including, but not limited to: fire prone electronics and appliances, counterfeit pharmaceuticals, and low quality building materials.^{1039 1040}

Conversely, the steep increase in Chinese FDI in Tanzania may contribute to domestic manufacturing, albeit with substantial profits siphoned off to China, and lead to improved employment. Additionally, the enforcement of Tanzanian labor laws may positively affect labor-management relations in Chinese owned companies operating in Tanzania.¹⁰⁴¹

The Center for Chinese Studies further notes that Tanzanian laborers report having some training opportunities for Chinese companies;¹⁰⁴² this knowledge transfer may contribute to a reverse of the negative trend in perceptions.

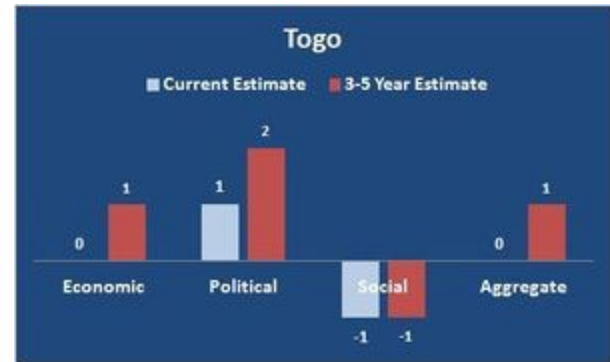
Analytic Notes

Source Reliability: High

Analytic Confidence: Medium

Togo

It is likely that the overall view of Togolese toward Chinese activity in their country will become slightly more positive over the next three to five years. Specifically, businessmen and politicians' views will grow more positive, while citizens' views will remain weakly negative.



Economic Narrative Report

It is likely that Togolese businessmen will develop a positive view of Chinese activities in their country over the next three to five years. This is due to high levels of investment in infrastructure and key industries as Togo continues to emerge from isolationism.

Togo only recently came out of isolation after the death of Dictator Gnassingbe Eyadema in 2005. Since then, Togo has gained international attention from the United States, European Union, and China.¹⁰⁴³ Chinese interest in Togo has been primarily economic, and it is likely that Togolese businessmen will view China positively over the next three to five years due to high levels of investment in infrastructure and key industries.

According to the Bertelsmann Foundation, China's increased demand for raw materials has the potential to revive Togo's export industries and improve the country's bargaining position in economic cooperation. Indeed, China has invested in Togo's infrastructure development and export capacity. In September 2009 the China Exim Bank loaned Togo USD165 million for road and telecommunications projects.¹⁰⁴⁴ In August 2012, China Merchants Holdings purchased a 50% stake in a company that owns development rights on the Lome Container Terminal. When fully developed, the port will be West Africa's first deep-water terminal and will give Lome first mover advantage in the region.¹⁰⁴⁵

China has assisted in developing the Togolese agricultural sector, the country's key industry. China loaned Togo USD12 million in November 2010 for agriculture and infrastructure development.¹⁰⁴⁶ In February 2011, Chinese Foreign Minister Yang Jiechi visited Togo and signed a USD7.8 million deal to fund agriculture, health care, and education.¹⁰⁴⁷ Overall Chinese foreign direct investment in Togo rose from USD1.85 million in 2004 to USD11.77 million in 2010.¹⁰⁴⁸



Togo Cotton Field

While cheap Chinese imports are blamed for hurting the textile industry,¹⁰⁴⁹ Togolese businessmen have adapted to reselling Chinese goods. According to a study in World Development, 95% of Togolese traders' goods are Chinese in origin. Traders benefit from increased profitability, and many traders appreciate Chinese trading practices as they make products available to poor Togolese. A wine glass seller in Lome stated in an interview, "For me, China has come to the rescue of Africa. Three quarters of our population is poor and they cannot

buy primary necessities...because it is produced in Europe and it is expensive.” A market trader in jewelry revealed, “I like this [Chinese] trade...we are making profits with them. Chinese products are not expensive, and we don’t need to travel to China.” Some traders also feel that they may be more willing to work with Chinese rather than Europeans due to the history of colonialism.¹⁰⁵⁰

Political

It is likely that Togolese politicians’ weakly positive view of China will improve positively over the next three to five years due to pledges to improve diplomatic ties.

- ❖ Togo came out of self-imposed isolation in 2005 with the death of President Gnassingbe Eyadema. Since then, Togo has opened up to the international community for much needed aid, and China has been a willing partner.¹⁰⁵¹
- ❖ Up until February 2011, China and Togo had signed 23 financial agreements and China had given USD240 million in loans. Togo's Foreign Minister praised the relationship with China and called for strengthened ties.¹⁰⁵²
- ❖ President Faure Gnassingbe also pledged to deepen bilateral ties with China in February 2011 during a visit of the Chinese Foreign Minister.¹⁰⁵³
- ❖ September 2012 marked 40 years of diplomatic ties between Togo and China and both countries’ presidents exchanged congratulations to celebrate the relationship.¹⁰⁵⁴
- ❖ China cancelled USD1.15 million of Togo's debt to commemorate the 40th anniversary.¹⁰⁵⁵

Social

It is likely the Togolese citizens’ weakly negative view of China will continue over the next three to five years due to damages to the textile industry and concerns over cheap Chinese goods.

- ❖ The Togolese people are calling for the regulation of the textile industry to eliminate fake Chinese products.¹⁰⁵⁶
- ❖ Imported Chinese goods are usually very affordable yet wear out quickly from low quality.^{1057 1058}

Analytic Notes

Source Reliability: Medium

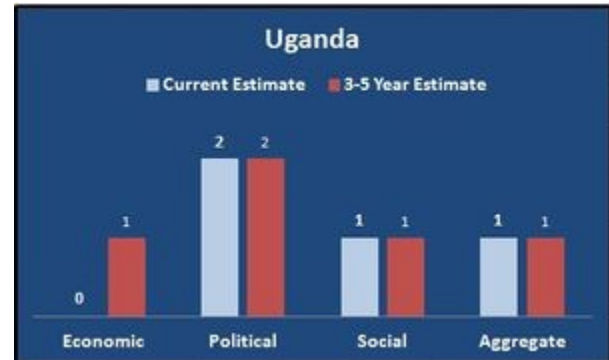
Analytic Confidence: Medium

Uganda

It is likely that over the next three to five years Ugandan overall perceptions will remain positive in all three sub-groupings.

Economic

Currently divided Ugandan business perceptions of Chinese activities are likely to increase slightly and become weakly positive in three to five years, although small traders in urban areas are still unlikely to have positive views.



- ❖ Abubaker Basajjabaka, a local Ugandan businessman who is enrolled in a Chinese class at the China-Uganda culture center, said that business acquaintances of his have been to China to study, bringing back qualifications and expertise back to Uganda.¹⁰⁵⁹
- ❖ In October 2012, Zhang Hao, one of Uganda's most widely known Chinese businessmen, is quoted as saying "I have found it easy to work with our people here. We have had to be prepared to abide by local traditions and religions, but there have been no great issues in that."¹⁰⁶⁰
- ❖ During the Second Company Cooperation Group meeting between the Federation of Uganda Employers (FUE), China Enterprise Confederation (CEC), and the Confederation of Norwegian Enterprise (NHO) in July 2012, Mr. Sentamu, Secretary General of the Kampala City Traders Association (KACITA) commended the development and transfer of technology brought by China to Uganda. In particular, he highlighted the contribution made by China in the construction and trade sectors. He also commended the continued growth in foreign Investment from China which had resulted into employment and income generation.¹⁰⁶¹
- ❖ At an April 2011 meeting between the FUE, CEC, and NHO, the three business organizations agreed to and signed the second installment of the cooperation pact "Doing responsible business in Uganda" from 2011 to 2014.¹⁰⁶²
- ❖ Mr. John Sebalamu, a Ugandan business owner, comment on local Chinese competitors: "I admired their way of doing business and copied the idea of building shopping malls which I introduced in Kampala. Mr. Fredrick Mangeni, another private business consultant, shared his thoughts on Chinese in Uganda: "Despite all complaints, China is the most vibrant business destination at least for those who have been there and everyone seems to be following the trend."¹⁰⁶³
- ❖ In an August 2012 article, James Mulwana, the chairman of Standard Chartered Bank in Uganda, noting discontent among some toward local Chinese businesses, placed the blame for disputes on the Ugandan government. He continued to say that while Ugandans bristle at the presence of small-time Chinese traders, on the whole Uganda seems to embrace investments into the country by the Chinese government.¹⁰⁶⁴

Though overall Ugandan business perceptions are likely to increase slightly, negative sentiments toward Chinese in Uganda have arisen in recent years, particularly in urban areas.

- ❖ Local Ugandans rioted against local Chinese traders in July 2011 and July 2012, citing Chinese traders undercutting prices charged by local traders. Many of Kampala's small

Ugandan run businesses view Chinese traders as receiving favorable treatment and engaging in unfair trade practices.^{1065 1066}

- ❖ Although the KACITA was not party to the riots, KACITA spokesperson Issa Sekito said they did not condemn the protests and said their grievances were legitimate. He additionally accused the Chinese of sometimes using dirty tricks and being “lucky,” in that they receive cheaper goods and loans from China.¹⁰⁶⁷
- ❖ Following the recent July 2012 riots in Kampala against Chinese traders, police reportedly arrested and deported 120 Chinese nationals for violated local business laws.¹⁰⁶⁸

Political

It is highly likely that Ugandan political elite perceptions of Chinese activities will remain strongly positive over the next three to five years.

- ❖ In October 2012, Ugandan President Yoweri Museveni expressed his gratitude to his Chinese counterpart Hu Jintao on Uganda's 50th independence. He said he appreciates China's action of establishing diplomatic relations with Uganda just nine days after Uganda's independence from the British colonial rule. For the past 50 years, Museveni said, Uganda and China have enjoyed excellent relations without any problems.^{1069 1070}
- ❖ The Ugandan Foreign Minister, Sam Kutesa, in October 2012 met with Chinese Foreign Minister Yang and thanked China for its support of Ugandan economic and social development and expressed his satisfaction with bilateral cooperation.¹⁰⁷¹ He also previously noted that support from China has is “very tremendous.”¹⁰⁷²
- ❖ Uganda is not set to have elections until 2016.¹⁰⁷³
- ❖ A Chinese delegation in January 2012 handed over a newly constructed building to house the president and prime minister's offices funded by China.¹⁰⁷⁴
- ❖ The Ugandan Ambassador to China, Mr. Wagidoso, in a July 2012 interview said, “We are really grateful that China supported Uganda during the struggle for independence, and supported Uganda politically and economically.”¹⁰⁷⁵
- ❖ Chinese projects have assisted in improving Uganda's road network as well as employing thousands and providing millions to the government through taxes.¹⁰⁷⁶

Social

It is likely that the popular perceptions of Ugandans toward Chinese activities is likely to remain weakly positive over the next three to five years, primarily due to a surge in jobs created by Chinese companies for Ugandans.

- ❖ According to the Uganda Investment Authority, over 265 Chinese companies have opened businesses in Uganda worth US\$596 million by end of 2011, creating over 28,000 jobs in sectors including petroleum, agriculture, infrastructure development and others.¹⁰⁷⁷ Additionally, China's ambassador to Uganda, Zhao Ya Li, estimated that Chinese companies in Uganda have created 30,000 local jobs and more are to come.¹⁰⁷⁸
- ❖ For instance, the Export-Import bank has provided a USD350 million low-interest loan to fund the construction of the Kampala-Entebbe Expressway. Although the main contractor is a Chinese company, 90% of the employees on the project will be Ugandan with some taking up management positions, according to Uganda's Foreign Minister, Sam Kutesa.¹⁰⁷⁹

- ❖ Huawei, a Chinese communications company with subsidiaries in Uganda, notes that half of their employees are keen to show off its corporate responsibility and has sponsored projects in local universities.¹⁰⁸⁰
- ❖ In a July 2012 interview, the Ugandan Ambassador to China said “We are really grateful that China supported Uganda during the struggle for independence, and has supported Uganda politically and economically.” The Ambassador also said, “I think I would say that Chinese and Ugandan social cultures are related. They are similar because Chinese people are very social and welcoming to foreign guests. That is the same situation in Uganda.”¹⁰⁸¹

However, recent polls have indicated that sentiments are not all positive.

- ❖ In a 2010 poll asking Africans to identify how helpful China has been in their country, Ugandans had the highest percentage saying China did not help at all with 28%.¹⁰⁸²

Analytic Notes

Source Reliability: Medium

Analytic Confidence: Medium

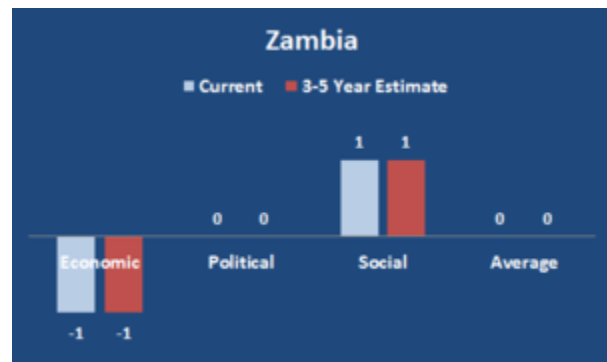
Zambia

Over the next three to five years, Zambian business, popular, and political perceptions of Chinese activity in Zambia are highly likely to diverge from current divided perceptions. Negative business views and divided political views are highly likely to remain at their current state while positive popular perceptions are likely to increase with a weak upward trend due to low interaction between the population and Chinese.

Economic

Business perceptions of Chinese in Zambia are negative and highly likely to remain so over the next three to five years due to China and other states' involvement in major industries and low domestic capacity to compete with imports.

- ❖ Zambia is a least developed economy and does not have substantial value-added production capabilities outside of labor intensive industries.¹⁰⁸³
- ❖ Zambian business cannot compete against Chinese imports in production industries and entrepreneurial activities are hampered by the influx of Chinese goods.¹⁰⁸⁴
- ❖ The country's dependence on resource exports further hampers private enterprise development.¹⁰⁸⁵



Political

The perception of political elites toward Chinese involvement in Zambia is divided and likely to remain so over the next three to five years.

- ❖ Zambia has a 113% trade surplus with China related to its mineral and metal exports.¹⁰⁸⁶
- ❖ The recently elected president, Michael Sata, ran on an anti-China platform in 2011 centered on reforming Chinese involvement in the mining industry and better trade and development relations.^{1087 1088}
- ❖ Zambia's dependence on China for its export market and developmental aid¹⁰⁸⁹ strains Sata's ability to shift policy and has forced the two countries to retain close economic and political relations.¹⁰⁹⁰

Conversely, the following negatively affects political elites' involvement in China.

- ❖ China cancelled 50% of Zambia's debt to the Chinese government in 2010 and continues to support infrastructure development projects in Zambia.^{1091 1092}
- ❖ The two governments signed a Memorandum of Understanding in 2012 committing China to provide economic and technical assistance to the Zambian government.¹⁰⁹³
- ❖ There is an historic political relationship dating to pre-Zambian independence leading to substantial development projects such as the TAZANA railway and Mulungushi Textile Factory.¹⁰⁹⁴

Social

Zambian perceptions of Chinese involvement in the country are positive and likely to remain positive over the next three to five years due to low interactions between the majority of the population and Chinese, insulating negative perceptions.

- ❖ 85% of the working population is employed in the agriculture sector;¹⁰⁹⁵ there are 25 farms in the country managed by Chinese¹⁰⁹⁶ indicating little interaction between the largest portion of the population and Chinese.

- ❖ 75% of Zambians perceive Chinese activities in their country to “help somewhat” or “help a lot.”¹⁰⁹⁷
- ❖ The historic political and social relationship dating to pre-independence and the commissioning of the TAZANA railway in the 1960’s promotes positive perceptions of Chinese involvement in Africa among the populace.¹⁰⁹⁸



Zambian miners protesting outside the Chinese Embassy

- ❖ The Chinese mining companies are not private enterprises and serve strategic state interests. They continue to operate when Western mining operations close due to high costs and international market pressure, garnering public support for Chinese involvement in the Zambian economy.¹⁰⁹⁹

However, the following may destabilize positive perceptions of Chinese activity in Zambia

- ❖ Mining riots and violent incidents continue to take place.^{1100 1101 1102 1103} The labor issues regarding Chinese mines do not affect the majority of the population¹¹⁰⁴ and the spread of the issue may negatively impact a wider social base.
- ❖ The value of external ownership of mining operations, particularly Chinese mining operations, in Zambia have extremely few benefits outside modest, labor intensive employment;¹¹⁰⁵ political and social support for more domestic benefits to mining may negatively impact perceptions of the Chinese.

Analytic Notes

Source Confidence: High

Analytic Confidence: Medium

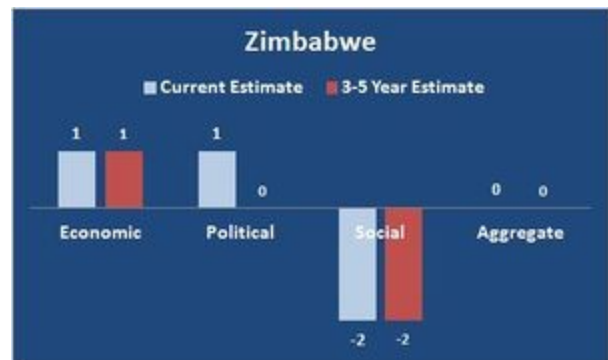
Zimbabwe

It is likely that Zimbabwean politicians and citizens' views of Chinese activities in their country will diminish over the next three to five years while businessmen's will remain weakly positive.

Economic

It is likely that Zimbabwean businessmen's weakly positive view of China will continue due to high levels of investment.

- ❖ China is looking to invest USD10 billion in Zimbabwe over the next four years. President Robert Mugabe and the coalition government support the investment and hope it can improve the economy. The deal would aim at mining and agriculture.¹¹⁰⁶
- ❖ Over the past four years, Chinese FDI in Zimbabwe totaled USD500 million. The investment targeted the agriculture, mining, construction, trade, and tourism sectors.¹¹⁰⁷
- ❖ Zimbabwe has been sanctioned by the West, and China has fulfilled the economic gap.¹¹⁰⁸
- ❖ China is paying USD3 billion for access to Zimbabwe's platinum rights.¹¹⁰⁹
- ❖ Trade is rapidly growing, from USD400 to 800 million in the past two years.¹¹¹⁰
- ❖ China is the top destination for Zimbabwean tobacco, and exports are on the rise.¹¹¹¹ However, it is a Chinese-owned firm that is the number one producer of Zimbabwean tobacco.¹¹¹²



Political

It is likely that the Mugabe government's weakly positive view of China will grow more divided over the next three to five years due to increased questioning of China's role in Zimbabwe.

- ❖ President Mugabe is heavily supported by China
- ❖ China is building and loaning USD98 million for a military compound, helping keep Mugabe in power.¹¹¹³
- ❖ Mugabe reportedly has a home in Hong Kong where he could flee to if ousted from power.¹¹¹⁴
- ❖ In 2010, China threw Robert Mugabe a birthday party at the Chinese embassy.¹¹¹⁵
- ❖ While the opposition to Mugabe in the Zimbabwean government has historically supported the relationship with China, there is growing hostility toward China.
- ❖ The Movement for Democratic Change (MDC) has been highly critical of Chinese involvement in Zimbabwe. They derided Chinese business owners for abusing workers and ignoring labor laws. The MDC called on Zimbabweans to boycott Chinese products.¹¹¹⁶
- ❖ Government ministers accused China of depriving USD200 million from the Marange diamond fields where the Chinese company Anjin runs operations.¹¹¹⁷



Zimbabwean President Robert Mugabe (R) welcomes the Chinese foreign affairs minister Yang Jiechi at the State House in Harare in February 2011

- ❖ Zimbabwean military officials hold large stakes in the Marange fields and reportedly use the funds to buy arms from China.¹¹¹⁸ Global Witness has asserted that the money from diamonds could go to funding violence during an election.¹¹¹⁹
- ❖ Deputy Prime Minister Arthur Mutambara of the opposition said this past May that the Zimbabwean government should be smarter in its dealings with China and should expand cooperation with other countries.^{1120 1121}

Social

It is likely that Zimbabwean citizens' strongly negative view of China is likely to remain strongly negative over the next three to five years due to worker abuse and poor quality goods.

- ❖ There are widespread accusations of Chinese managers mistreating and beating their Zimbabwean workers.¹¹²²
- ❖ Chinese company Anjin is one of the most active in the Marange diamond mine. The entire operation has come under fire for human rights abuses.¹¹²³
- ❖ Workers for Anjin have gone on strike eight times over the past two years.¹¹²⁴
- ❖ Zimbabweans use the word “zhing-zhong” to describe cheap Chinese goods. The Financial Gazette said “the Chinese are accused of siphoning Zimbabwe’s scarce foreign currency earnings, dumping inferior products locally and exploiting locals they employ at a number of their companies dotted in and around the country.”^{1125 1126}

Analytic Notes

Source Reliability: Low

Analytic Confidence: Medium

Annex 1: List of Sub-Saharan African Countries

The ACE Team utilized the definition of "Sub-Saharan Africa" as defined by the United States Department of State. The following countries were included in the project:

- | | |
|---|---------------------------|
| 1. Angola | 26. Madagascar |
| 2. Benin | 27. Malawi |
| 3. Botswana | 28. Mali |
| 4. Burkina Faso | 29. Mauritania |
| 5. Burundi | 30. Mauritius |
| 6. Cameroon | 31. Mozambique |
| 7. Cape Verde | 32. Namibia |
| 8. Central African Republic | 33. Niger |
| 9. Chad | 34. Nigeria |
| 10. Comoros | 35. Rwanda |
| 11. Congo, Democratic Republic of the (DRC) | 36. Sao Tome and Principe |
| 12. Congo, Republic of the | 37. Senegal |
| 13. Cote d'Ivoire | 38. Seychelles |
| 14. Djibouti | 39. Sierra Leone |
| 15. Equatorial Guinea | 40. Somalia |
| 16. Eritrea | 41. South Africa |
| 17. Ethiopia | 42. South Sudan |
| 18. Gabon | 43. Sudan |
| 19. Gambia, The | 44. Swaziland |
| 20. Ghana | 45. Tanzania |
| 21. Guinea | 46. Togo |
| 22. Guinea-Bissau | 47. Uganda |
| 23. Kenya | 48. Zambia |
| 24. Lesotho | 49. Zimbabwe |
| 25. Liberia | |

Annex 2: Multi-Criteria Intelligence Matrix

The Multi-Criteria Intelligence Matrix (MCIM) was used to roughly estimate the strength of the relationship between China and each Sub-Saharan African country. The MCIM is based on quantitative data compiled in the Initial Data Matrix. Each country was ranked from a scale of 1-49, with 1 being the best. The full matrix can be found [here](#). Additionally, in each sub-grouping, each country was ranked by the information provided in that sub-group. For more information on MCIM, please refer [here](#).

Annex 3: Initial Data Matrix

The Initial Data Matrix includes all quantitative data retrieved early on in the project. This is the information the MCIM is based off and can be found [here](#).

Annex 4: Contact Information

Lindsey Bostwick

Phone: 716.365.9217

Email: lbostw70@lakers.mercyhurst.edu

Jacob Johnson

Phone: 814.572.9051

Email: jjohns04@lakers.mercyhurst.edu

Joe Reinhard

Phone: 440.251.1382

Email: jreinh21@lakers.mercyhurst.edu

Spencer Vuksic

Phone: 971.244.2541

Email: svuksi09@lakers.mercyhurst.edu

Grant Warnock

Phone: 814.572.2534

Email: gwarno55@lakers.mercyhurst.edu

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